University of Alberta

Supporting Inclusive, Safe and Caring Schools: Connecting Factors

by

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Abstract

Inclusion of students with special education needs into regular classrooms, and prevention of violence in schools are two important social or public policies with which school administrators and teachers are faced in today's public education system. If school staffs are to be effective at implementing these two public policies, what factors connect them? Much research is independently known about inclusive education or violence prevention in schools. However, to date, no one has explicitly studied the policy connections or common factors that make school environments both inclusive of students with special needs *and* safe for all students. Identification of the connecting factors between policies on inclusive education and safe schools was explored in this study. Using a case study approach, four schools were purposely selected and a total of 36 school staff members were interviewed. Data from interviews, observations and relevant policy documents were analyzed using the constant comparative analysis inherent in grounded theory methodology.

In schools that were successful in providing an inclusive education and safe and caring environment, school staffs *owned* their process and organized themselves accordingly. What staff in successful schools said and did, individually and collectively, was a result of a common vision or moral purpose, reflected in commitment, collaboration and consistency of practice, development of pedagogical capacity and a school culture that led to positive outcomes for students and staff. It was not a result of a written provincial or district policy statement. The core variable connecting an inclusive with a safe and caring school was staff ownership of the policy implementation process.

This study found that the inclusive schools selected were also safe and caring. The safe and caring schools selected were also inclusive. The schools studied were successful in providing an inclusive, safe and caring school because staffs organized themselves accordingly. One caveat to this theory is the ability to successfully include all students with severe behaviour disorders.

An inclusive and safe school is not just about how to accommodate student diversity and respond to student behaviors. It is also about creating a school that is capable of continuous improvement. Ultimately, it is about increasing sharing leadership, adapting to challenges and bridging policy to best practice. This study concludes with a discussion of the connecting factors and uses the literature on school improvement and educational policy implementation to further interpret the findings. This study's findings also suggest that the gap between the policy and practice should not be as wide as it is. Like any other school reform effort, closing the gap between policy and practice requires school staff to progress from having a common vision to ownership of the implementation process. This is possible when school staff is provided the necessary resources, namely time to collaborate, develop commitment, build capacity and work to ensure the school culture supports the school's goal or mission.

DEDICATION

This thesis is dedicated to my family, friends, colleagues and mentors to share my ultimate gratitude, and more importantly, for your patience.

Frank Peters, you provided me time and space to get my research completed by giving me pep talks and deadlines. Thank you for your additional support with the bureaucracy, the need for clarity and focus. Thank you for agreeing to be my research advisor and working effectively with my frustrations!

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Acknowledgement

This is OKAY: A Social Story About Differentiation and Inclusion

I teach in a school that is working towards inclusion.
That means I will have to try to change the way I teach and plan for my students.
This is OKAY.
I will try to see students as unique individuals and meet them where they are.
I will try to differentiate the content, the process, the product and the learning environment to meet the needs of my students.
I will assess for learning, not just of learning.
This is OKAY.
This means that
Sometimes I may teach all my students as a whole class together.
Sometimes my students will try to work in dynamic groups.
This is OKAY.
Sometimes my students will work on similar activities.
Sometimes my classroom will be noise and full of activity.
This is OKAY.
I will try to give up some of my personal teaching preferences as will try to allow my students' strengths and learning styles take precedence in my classroom.
This makes me feel uncomfortable for a while as I become accustomed to new methods.
This is OKAY.
I may have crazy days, have sleepless nights, go grey prematurely and wonder exactly what it is I am doing but,
This is OKAY
Because I know these feelings will pass when I see the progress and growth each of my students will make.

Dawn Croutch-Buehner
Teacher, Grade 2

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Chapter 1

INTRODUCTION TO THE STUDY

Introduction

Inclusion of students with special education needs into regular classrooms and prevention of violence in schools are two important social or public policies with which school administrators and teachers are currently faced in today's public education system. Studies on inclusive education or violence prevention in schools have been conducted and reported. However, to date, no one has explicitly studied the connections or common factors that make school environments both inclusive of students with special needs *and* safe for all students. Identification of the connecting factors between successful implementation of policies to support inclusive education and safe schools is explored in this study. This study explored the following broad questions: If a school provides an inclusive education, what factors contributed to its inclusiveness? If a school provides a safe and caring environment, what factors contributed to its safety and caring? Do the factors that resulted in an inclusive school connect with the factors that resulted in a safe and caring school? If school staffs were successful in implementing these two public policies, what factors contributed to their success?

To address these questions, schools were needed for further study. Four elementary schools were selected, from those nominated, as exemplars of success with inclusive education or as a safe and caring school. Staff were interviewed and observed in classrooms. Policy documents were examined. The data are analyzed, interpreted and discussed in relation to what each staff member said and did to make their school inclusive or safe for all students.

Sugai, Bullis, and Cumland (1997) argue that any effort to improve teaching and instruction of students should be carefully approached, based on promising or preferred practices, and evaluated fully before reaching any final conclusions. This study attempted to get at those promising or preferred practices. Peters and Heron (1993) defined preferred and promising practices. “Promising” describes practices for which empirical support is not available but display individual features that have been systematically investigated, are conceptually or theoretically sound and have appealing applied characteristics. “Preferred” describes practices for which supporting empirical research has been conducted and statements can be made about the conditions under which a given strategy has been shown to have positive effects. “Best” practice is a process, not a program; an approach, rather than a package (Neel, Alexander & Meadows, 1997). This study focused on the school-level factors amenable to teacher influence and describes the professional support teachers needed to move from a promising practice to best practice.

Based on my analysis of the data, the findings are interpreted and discussed to inform future policy and practice. The data gathered were used to develop a theory to explain each school’s success in terms readily identifiable to other school staffs striving to provide inclusive and safe schools for students. This study was tempered with pragmatism as I hoped to uncover what it was that made school staffs successful with policy implementation and to share the results with many other school staffs and school leaders to support their ongoing efforts to effectively respond to student diversity and behaviours.

Research Problem

This study, what factors make public schools inclusive *and* safe for all students, began with my desire to understand how schools became fully supportive of the implementation of the respective provincial policy. My rationale was to determine what staff actions or practices were most effective to support all students within an inclusive education and safe school environment. To fully understand the policy implementation process, I needed to study examples of best practices and analyze the evidence of policy implementation at the school level.

I studied four elementary schools in different communities. In response to a description of this study and selection criteria, schools were nominated by a senior administrator based on the school's reputation of being either inclusive or safe and caring. Of the 13 schools nominated and visited, four were selected for further study, based on the selection criteria. Each school operated under the same provincial policies and was equally challenged by adequacy of resources and funding provided to public schools in Alberta.

Significance of Problem

Since 1992, Alberta teachers have publicly and passionately voiced concerns on a number of issues, including their frustrations with student conduct and the integration of students with special needs without support or services. A highly publicized report of the Alberta Teachers' Association (1992), *Trying To Teach: Necessary Conditions,* followed by similar stakeholder reports (Alberta Teachers' Association, 1997; Alberta School Boards Association, 1997), found that teachers supported the inclusion of students with special needs but were frustrated. Teachers' most pressing concerns were trying to teach students with special needs or behaviour difficulties in regular classrooms without sufficient notice or information, teacher training, and classroom support. Yet many school districts moved to include more and more students with special educational needs into regular classrooms. An ongoing challenge for inclusive classrooms is meeting the instructional needs of all learners; especially when content is challenging and when student needs are increasingly diverse (Mastropieri, et.al., 2006).

Task forces and provincial surveys indicated that bullying and harassment are major concerns in public schools (e.g., Alberta Education, 1994; Alberta School Boards Association, 1994; MacDonald, 1995; Malicky, Shapiro, & Mazurek, 1999). In the Province of Alberta, the *School Act* (2004) requires school principals to maintain order and discipline (section 20(f)). Principals must also ensure that each student enrolled in the school is provided a safe and caring environment that fosters and maintains respectful, responsible behavior (section 45(8)). A common response of some schools to any form of violence has been to "get-tough" which often results in a rise in student expulsions and assertions of zero-tolerance for any misbehaviour. MacDonald (1996) argued that get-tough practices increase problems and lead to more violence because it results in adults trying to exert control over students rather than empowering students to control themselves. If the purpose of the education system is to foster and maintain respectful, responsible behaviours in students, teachers need help to develop such character traits. Teachers support inclusive, safe and caring schools but need more support (Alberta Teachers' Association, 1997; Alberta School Boards Association, 1997). This research problem is significant as teachers are obligated by provincial policies to include students with special needs into regular classrooms and ensure each student is provided a safe and caring school environment. If teachers agree with these policies yet experience frustration, the issue of how best to support them has to be studied.

Research Focus

The central research focus of this study is on what staffs in public schools say and do that result in their successful implementation of two provincial policies, namely, inclusive education and safe schools. This study is of practical relevance to school staffs who are confronted daily by student diversity, school safety needs, and a host of other provincially mandated policies.

This study investigated the broad central question:

> *How does a school staff create and maintain a school environment that is inclusive, and safe and caring for all students?*

To uncover more in-depth answers to the broader question, specific sub-questions were also explored:

1. How do staff define an inclusive school (or a safe and caring school)?
2. What does an inclusive education (or a safe and caring school) environment look like in practice?

3. What do staff say and do that results in students feeling "included" (or "safe" and "cared for") in classrooms and schools? What recommendations do they have for other school staff?

4. What supports are needed for staff to provide an inclusive (or safe and caring school) environment for all students? What is the most effective use of these additional supports?

5. What knowledge does staff have about policy related to inclusive education (or safe and caring schools)? What policy recommendations do they have?

6. How do staff define success and what are the indicators of an inclusive (or safe and caring school) environment?

Given the lack of literature or theory specific to this research problem, I needed to start from the ground and build a theory that connected two substantive areas: inclusive education with safe school initiatives. This study presents a small-scale qualitative research study using a case study approach to investigate and identify the factors that contributed to the successful implementation of policy that resulted in a school being inclusive and safe for all students. This study also identifies school-based implementation of policy and school staffs' perceptions of the supports required to be successful.

Significance of Study

In reviewing the literature, I initially searched for the factors that connected safe schools with inclusive schools. I found a real void in the literature and no researched study with such an explicit focus. I searched the literature for research studies that examined the process of bridging written government policy to effective school-based inclusive practices and school safety. The literature was evasive on these foci. This study is significant because, to date, no research study was found to explicitly connect inclusive schools with safe schools and the effectiveness of school-based implementation of policy. This study is significant for a number of other reasons.

This study is significant because it explores how government policy is implemented at the school level. To better understand policy implementation, it is important to examine the contexts within which it is done (Honig, 2007). The factors that supported educational policy implementation are identified by what school staff said and did in each school studied. How policy was actualized through implementation by school staff identifies the activities that gave the policy effect. Four schools were studied as policy implementation sites. Practices and supports are identified by school staff based on their experiences and how they made sense of each policy's intent.

This study is significant because it explores school-based factors that support inclusive education. For example, in Alberta, the *Standards for Special Education* (Alberta Education, 2004), Standard 10(a) states that school boards must "ensure that educating students with special education needs in neighbourhood or local schools shall be the first placement option to be considered by school boards, in consultation with parents, school staff and, when appropriate, students." (p. 10). It is the responsibility of school boards to meet this standard. If schools are to be accorded the primary responsibility for providing an inclusive education to students with special educational needs, attention needs to be paid to the process involved (Thomas & Loxley, 2001). Two fully inclusive schools are studied to explore those factors identified by school staffs as important to their success, and illustrate the process used to support policy and practice.

This study is also significant because it explores school-based factors that support a safe and caring school environment. This is important as Alberta's public schools have a legal mandate to ensure "each student enrolled in a school operated by a board is provided with a safe and caring environment that fosters and maintains respectful responsible behaviors" (Province of Alberta, section 45(8)). School safety is an issue high on the public agenda and there are serious legal implications for a school's nonresponse (Torjman, 2005). This study makes a case for the importance of this provincial policy statement and gathers evidence that supports a school's effective response.

My review of the literature revealed overall support by teachers and school principals for these two government initiatives, yet challenges existed with school-based policy implementation efforts as evidenced in related provincial task force reports. These provincial reports by key stakeholders (e.g., Alberta Teachers' Association, 1997 and Alberta School Boards Association, 1997) highlight the differences between policy as designed and policy as implemented in schools. The life of schools and classrooms has much to teach policy makers about the design and implementation of effective educational policy (Elmore, 2004). This study is significant because the four schools studied were reported to be successful with the respective implementation of policy. School staffs achieved their results when they were able to connect what the respective policy prescribed with the context and conditions at the school level. Creating change was hard work. This study helps to explain the difference between policy as written and implemented by illustrating the context in which school staffs were effective. It also explains how the staff developed the heart and commitment to change, not just the head and compliance (Hulley & Dier, 2005).

This study is also significant as it attempts to connect two government policies with examples of implementation at the school or classroom level. Schools are often required to adopt a number of policies or initiatives and the pressure to enact multiple initiatives simultaneously can outstrip the capacity of schools to implement any one initiative effectively (Malen, 2007). The study of two separate policy statements to identify the connecting factors could assist school staffs strategically embrace two policies simultaneously, to work smarter, not harder; and to be more effective with their time and resources.

The findings from this study can help teachers to further understand and be knowledgeable about other government policies, including the legislated and ethical frameworks within which they work. Key words are used in government policy, such as "appreciate individual differences", "respectful", "responsible" and "specially designed instruction" are important concepts but their substantive meanings are not always transparent to classroom teachers. For example, government policy on the *Teaching Quality Standard Applicable to the Provision of Basic Education in Alberta* (Alberta Education, 1997) describes the knowledge, skills and attributes expected of all teachers in Alberta. This *Teaching Quality Standard* includes the following descriptors of professional practice: teachers must "appreciate individual differences and believe all students can learn" (3(d)); "establish learning environments wherein students feel physically, psychologically, socially and culturally safe" (3(f)); and "maintain acceptable levels of student conduct, and use discipline strategies that result in a positive environment conducive to student learning" (3(f)). These substantive meanings can be learned from careful study of what school staff say and do (Manzer, 1994) and this study provides a better understanding of these meanings within the school context. Ultimately, the ability of school staffs to integrate policies would assist teachers to honour their legal and professional obligations, improve the quality of teaching, and provide an inclusive and safe environment for all students.

Finally, this study is significant because it captures best practices from the four schools studied and the staff involved. These practices are then examined in relation to literature. Theory guides practice but practices must by necessity, add details that were contemplated in the origins of the original policy. So a properly designed implementation process should provide a mechanism for policy feedback (Pal, 1997). The findings of this study are significant because they can help school staffs to make meaningful investment in what works to support policies on inclusive, safe and caring schools. This study illustrates how specific schools challenged the organizational status quo, responded better to students' needs, developed more favourable teaching conditions, and influenced school-based policy implementation.

Organization of Thesis

In this chapter I introduce the reader to a study that seeks to illustrate the factors that connect inclusive education to safe school policies to practices. The research questions and significance of this study are presented. This study's contribution to future policy development and best practices is important to school staff responsible for implementing these two policies.

Chapter 2 presents the literature used to support the focus and shape of this study. This chapter provides definitions, the provincial policy that supports inclusive education and safe schools and legal precedents. This chapter also highlights the challenges faced by school staffs in implementing provincial policies specific to inclusive education and safe and caring schools. Task force reports and legal challenges are drawn from the Province of Alberta or within Canada as this is the context this study is situated in. The focus of this chapter is to further demonstrate the importance of this study and implications for policy and practice.

Chapter 3 presents the research design and methodology used to shape this study. Case study criteria and selection, data collection and procedures used are provided using grounded theory methodology. How the study was completed is presented along with the procedures used. Limitations, delimitations, ethical considerations and research beliefs and bias are presented. The focus of this chapter is to ensure trustworthiness of the research process and support for the process used to obtain this study's findings.

Chapter 4 presents the data obtained and analyzed from each of the four cases studied. The focus of this chapter is to highlight the aggregated data from observations, interviews, and document analysis. Data is provided in a framework that includes the context, mission, supports, indicators and challenges for each school studied. This chapter serves to illustrate how and why each school was successful.

Chapter 5 presents the process used to further analyze the data collected and to generate the theory to support the policy factors that connected inclusive schools with safe schools. Participants' responses to the interview questions and observations of practice are used to illustrate the progressive nature of analysis using a constant comparison method.

Chapter 6 interprets the findings from the comparative case study and grounded in the data. The connecting policy factors are explained using illustrative examples. The caveat found in this study is also presented. The findings are related to the literature and further examined in terms of the theory developed that connects the factors between inclusive schools and safe schools.

Chapter 7 provides an analysis of the interpretations to further explain the interconnectedness of the findings. Discussion on the theory developed is then enhanced by the literature on leadership, adaptive challenges and bridging policy to practice.

Chapter 8 provides a summary of this study, conclusions and recommendations. It includes a discussion on policy derived from the interpretation of the successful practices that gave each policy its positive effect. My rethinking what educational policy, inclusive education and school safety is also included based on my personal reflections and experiences. Recommendations for future policy development are made in addition to future research recommendations.

Summary

This chapter serves to introduce the purpose of the study and its significance to future policy development in the areas of inclusive education and safe schools. This study is significant because to date no one has explicitly identified the factors that connect these two public policies. This chapter also sets the stage for the next chapter, which provides an overview of the related literature and the challenges schools face.

Chapter 2

REVIEW OF THE LITERATURE

Introduction

Chapter 2 presents the review of the literature, definitions, respective policies and legal precedents are provided to help bring a focus to the complexities of providing inclusive education and ensuring school safety. This chapter also provides a provincial overview of Alberta's policies and task force reports that illustrate the challenges highlighted by school staff in regards to the placement of students with special needs into regular classrooms, and requirements to provide a safe school environment for all students. Defining public policy and the challenges of implementing education-related policy are then addressed. The chapter concludes with a comparison of inclusive education efforts with safe school initiatives. The implications for the design of this study follow in the next chapter.

Definition of Inclusive Education

In tracing the evolution of the definition of inclusive education, the word *inclusion* was first reported to be used as a result of a meeting in Toronto. O'Brien and Forest (1989) reported that a group of people from North America brainstormed came up with the concept to formally describe the process for placing students with disabilities in the mainstream. The foundation for the mainstreaming and subsequent inclusive education movement is attributed to two articles that are viewed as the most influential in the history of special education (McLeskey, 2007). Dunn (1968) and Deno (1970) released opinion articles that generated a great deal of controversy in the field of special education at the time. In the article, *Special Education for the Mildly retarded: Is Much of It Justifiable?* Lloyd Dunn took the position that a large proportion of special education in its present form is obsolete and unjustified from the view of students so placed. He argued that, "present and past practices have their major justification in removing pressures on regular teachers and pupils, at the expense of the socioculturally deprived slow learning pupils themselves" (p. 6). According to Dunn (1968), 60 – 80% of students labeled as mild mentally retarded, and placed in special education classrooms, were from low socio-economic families and minority groups. Dunn (1968) called for a moratorium on special class placements and also to examine the effects of disability labels on the attitudes and expectancies of teachers and the pupils themselves. He made the point that for many students, placement in special education classrooms is unjustified and that a better education for children with mild learning problems is needed. His thesis was to stop labeling and segregating so many students for two reasons. One was that special education in its current form was obsolete and unjustifiable from the point of view of students. The other reason was the need to do something better. He did not argue for doing away with special education programs. He argued that current practice justified removing pressures on regular classroom teachers at the expense of some students and that students placed in special education programs made less progress than students of comparable ability in integrated schools. Labeling a child as handicapped reduced the teacher's expectancy for him or her to succeed. Further, the available research studies on the lack of efficacy of special education classes supported Dunn's other reason for the need to change practice. His position at that time was, "much of our past and present practices are morally and educationally wrong" (p. 5).

Following the release of Dunn's (1968) article, Evelyn Deno (1970) published her article and argued that special education should be used as developmental capital to help general education accommodate an increasingly diverse range of students. Deno (1970) proposed that special education "conceive itself primarily as an instrument for facilitation of educational change and development of better means of meeting the learning needs of children who are different" and special education should "organize itself to do that kind of educational services job rather than organize itself as primarily a curriculum and instruction resources for clientele defined as pathologically different by categorical criteria" (p. 229). Deno (1970) provided a framework to support her argument. This framework, or cascade system of special education service, received broad-based support and served as a rationale for the least restrictive environment movement in the United States (McLeskey, 2007).

Dunn (1968) and Deno (1970) articles served as a catalyst to begin thinking about the nature of the relationship between special education and general education and the concept of inclusion emerged (McLeskey, 2007). However, the recommendations made in these two articles were not broadly implemented. General and special education systems continued to remain separate in terms of teacher education, accountability, professional development and organization.

Madeline Will, as Assistant Secretary for the Office of Special Education and Rehabilitative Services for the U.S. Department of Education, published an article that calling for a shared responsibility for educating children with learning problems. Will (1986) argued that the way special education system was organized to identify students and deliver services created barriers to the successful education of these students. Barriers included: eligibility requirements that excluded many students who needed assistance; equating poor student performance with having a disability and assistance could only be provided if labeled as having a disability; and special education services were only available to students after they have failed in school. She believed that the language and terminology used to describe the education system was a language of "separation, of fragmentation, of removal" which reflected "a flawed vision of education for our children" (p. 412). To address these issues, Will (1986) believed that a shared responsibility between general and special education would improve the educational outcomes for all students with learning difficulties. She also called for empowering building-level administrators to reform schools so they were better able to address the needs of all students by assembling "professional and other resources for delivering effective, coordinated, comprehensive services for all students" (p. 413). This meant that "special programs and regular education programs must be allowed to collectively contribute skills and resources to carry out individualized education plans based on individualized education needs" (p. 413). Will (1986) defined effective schools as those that shared responsibility for students with learning difficulties as and schools which "employ principals who are actively engaged in instructional leadership, teachers who work together as a team, testing and evaluating to monitor educational progress, and parents who function as informed partners in decision-making" (p. 414).

These calls, by leaders in the field at that time, to integrate students with disabilities into regular classrooms and the arguments made to reduce the labeling of students in order to provide assistance were based primarily on philosophical principles (Salend and Garrick-Duhaney, 2007), not research studies. In this context and at the time, Carlberg and Kavale (1980) conducted a meta-analysis of studies to examine the efficacy of special education and general education placements for students with disabilities. They synthesized the findings from 50 best-designed efficacy studies on the impact of placement on students. They found that education in the regular classroom was more beneficial to students with disabilities than education in special settings. However, their analysis of their results revealed that the benefits of being in the regular classroom were greater for some students than for others. For students with mild cognitive delays, general education placement was superior. For students with behavior or learning disorders, special class placement was better. Baker, Wang and Walberg (1994) compared the effect of inclusive versus non-inclusive educational practices for students with mild to moderate special needs. They reported a small to moderate beneficial effect of inclusive education on the academic and social outcomes of students with special needs. This finding suggests that students with special needs educated in regular classrooms did better academically and socially compared to students in non-inclusive settings.

In the time period that these studies were conducted, the terms mainstreaming and inclusion referred to a range of partial or full-time placement in general education classrooms. The definitions varied greatly between each of the studies analyzed and because the concept of mainstreaming was broadly interpreted and implemented, many different service delivery models were included in Carlberg and Kavale's (1980) meta-analysis. Studying independent variables such as inclusive programs is difficult. Such programs are multifaceted and varied in their implementation and in the amount of support provided. Due to the nature of the studies examined at this time, these researchers were unable to adequately identify or describe the conditions that promoted successful inclusion of students with disabilities into regular classrooms.

Since the publication of the articles highlighted above, inclusive education became a major policy initiative throughout North America. Problems associated with the degree of implementation of inclusive education during this period of time were due, in part, to the attitudes of general education teachers (Waldron, 2007). Several studies investigated the attitudes of teachers towards inclusive education as well as their experiences working in inclusive classrooms. One frequently cited study was by Scruggs and Mastropieri (1996). They analyzed the available research studies on general education teachers' perceptions of mainstreaming and inclusion and their views towards teaching students with disabilities in regular classrooms. In reviewing the research on teacher attitudes on inclusion, they reviewed 28 studies that surveyed more than 10,000 teachers and other school personnel, representing a large geographical area and educational experiences.

Scruggs and Mastropieri (1996) found that the majority of teachers agreed with the concept of mainstreaming/inclusion. This indicated that teachers believed that inclusion was a desirable educational practice. This finding suggests that teachers' concerns about inclusion were more related to the need for support to enable teachers to be successful. Support includes sufficient time and resources to effectively manage an inclusive program and the need for professional development to prepare general education teachers for the diverse needs of students. Scruggs and Mastropieri (1996) also found that a substantial minority believed that students with disabilities would be disruptive to their classes or demand too much attention. These teachers expressed concern that some students would be included without support and this would have a negative impact on other students. These concerns should be raised by classroom teachers when any new program or initiative is introduced without support. Teachers should be cautious about change until they are knowledgeable, prepared and supported. One limitation of this study is that the findings were not based on actual observations in general education classrooms or interviews with teachers. However, the major finding was that teachers are supportive of inclusion if programs were well developed and if teacher received appropriate training and resources to ensure success. Teachers resist having children with disabilities placed into their classrooms when their concerns are not addressed appropriately.

Another study on teachers' perceptions and the effects of an inclusion model on students with learning disabilities was conducted by Banerji and Dailey (1995). This study was conducted in an elementary school in the United States. The student sample consisted of 13 students with learning disabilities and 17 students without any disabilities placed into inclusive classrooms and co-taught by general and special education teachers. All students were provided with an age-appropriate curriculum. No student was excluded from any available educational opportunities, cooperative learning and instructional component. Ten teachers then provided their perceptions of growth of all students served with Grades 2 – 4. The findings of this study suggest that students with learning disabilities made academic and affective gains at a pace comparable to the normally achieving students. Parents and teachers reported improved self-esteem and motivation. A limitation of this study was a lack of a comparison sample group. A comparison group of students with learning disabilities served in a pull-out program or special education classroom could have been included to determine the level of academic and effective gains.

The studies highlighted above on inclusive education found general teacher support for the concept yet a concise definition of what inclusive education was not used. Terms such as *inclusion, integration* and *mainstreaming* were often used to mean the same thing. The terminology appears to have evolved to describe the progressive level of inclusion of students with disabilities in general education classrooms. In the early 1980s, "mainstreaming" was a widely accepted term and was used in the literature only in reference to students with mild disabilities. This suggests that students with a disability had to fit into the regular classroom with little accommodation for the student's needs (McLeskey, 2007). The term "integration" was more associated with closing separate schools for students with severe disabilities and relocating classes for these students on regular school campuses and in neighbourhood schools. The term "inclusion" emerged in the 1990s by advocates to more accurately communicate their claim that all children, including the severely disabled, needed to be included in the educational and social life of their neighbourhood school and classrooms.

Much research has been conducted on inclusive education. To date, most of the recommendations encourage further research and development of the knowledge and understanding underlying inclusive education (Davis, 2002). No single agreed-upon definition, legal or theoretical, of inclusive education exists. The use of the terms in research and in the work of professionals has led to much confusion and division in the field and therefore many interpretations of exactly what inclusion means in practice (McLeskey, 2007). Examples of current different definitions, found in provincial policy and the literature, are provided below to illustrate the different views of what inclusive education is.

Ferguson (1995), a full inclusion advocate, defined inclusive education as a single system for all students:

> The meshing of general education and special education reform initiatives and strategies in order to achieve a unified system of public education that incorporates all children and youth as active, fully participating members of the school community, that views diversity as the end that achieves a high quality education for each student assuring meaningful effective teaching and necessary supports for each student. (p.281)

Ferguson further argued that schools need to be changed or reconceptualized for individual students. The ability of schools to effectively respond to student diversity was the means to achieve a high quality education.

The Province of Alberta's definition of inclusion includes the placement and specialized instruction of students with special needs into regular classrooms. Inclusion "refers not merely to setting but to specially designed instruction and supports for students with special education needs in regular classrooms and neighbourhood schools" (Alberta Education, 2004, p. 1).

The Province of Manitoba, in 1999, reviewed its special education programs and practices. Among the forty-four recommendations from this review, one suggested that changes be made to legislation to achieve consistency with the equality rights. This recommendation provided the impetus for Bill 13: *The Public Schools Amendment Act,* also known as Appropriate Educational Programming (Manitoba Education, Citizenship and Youth, 2006). This legislation emphasizes the value of inclusive education. The definition of inclusion in Manitoba is:

> Inclusion is a way of thinking and acting that permits individuals to feel accepted, valued, and safe. An inclusive community consciously evolves to meet the changing needs of its members. Through recognition and support, an inclusive community provides meaningful involvement in and equal access to the benefits of citizenship. (p. 9).

The heart of the inclusion efforts in Manitoba focus on "substantive equality" (Manitoba Education, Citizenship and Youth, 2006, p. 8) which is defined as the duty to accommodate. This means preventing and removing barriers to the full participation in the education environment in ways that accommodate students' unique circumstances. This pending legislation reflects the government's commitment to ensure the education system meets the needs of all students.

The Special Education Council of the Alberta Teachers' Association (1998) is a sub-group of the provincial teachers' association. This Council defined inclusive education as both a process, specifying a degree of participation and referenced support needed:

> The process of educating students with special needs in regular classrooms with same aged peers without special needs on a part or full time basis … It is further strengthened and supported when specially trained personnel and services are infused into general education based on the best educational interests of children, not budgetary constraints, administrative convenience or categories of disabling conditions. (p. 1)

Mel Ainscow (1991), a prominent British researcher in special education and advocate for school improvement for all students, defined inclusion as "a process of increasing the participation of students in and reducing their exclusion from the cultures, curricula and communities of their local schools" (p. 218). Drawing on his experiences working with and in schools, Ainscow (1999) research focused on why and how an inclusive school comes to be that way and in what ways others schools could be enabled to develop similar practices. He is of the opinion that inclusion has to be more that the simple placement of students with special needs into regular classrooms. It has to be concerned with overcoming barriers to participation that may be experienced by any student. Ainscow (1999) described the process of inclusion as "a never ending process rather than a simple change of state…and dependent on continuous pedagogical and organizational development within the mainstream" (p. 218). He further argued that we need to seek environmental interventions rather than individual interventions as inclusive education is inextricably linked to the development of organizations in which teachers work. The process of increasing the participation of all students entails reducing the pressure to exclude students. "Even the most pedagogically advanced methods will likely to be ineffective in the hands of teachers who subscribe to a beliefs system that sees some students as in need of fixing, or worse, as deficient and beyond fixing" (p. 109). "This sort of problem has to be solved at the individual level before it can be solved at the organizational level"

(Ainscow, 2000, p. 114). Inclusion should not be about location of students assigned to a special education category as it leads to an assumption that solutions must focus on prevention or cures to make these students fit into an unconstructed education system (Booth & Ainscow, 1998).

Staff development can facilitate improvements in schools only when it digs deeper into the culture of the schools. The culture needed to sustain Ainscow's (1999) perspective is predicated on cooperation and collaboration which enables a school to bring all its resources to effectively respond to the problems generated by student diversity. This research highlights the importance of collaboration as a means of developing the conditions that are necessary for encouraging inclusive education. Ainscow (1999) listed features of "moving" inclusive schools. These are: "effective leadership spread throughout the school; involvement of staff, students and community in policies and decisions; commitment to collaborative planning; attention to practice in inquiry and reflection; and a policy for staff development that focuses on classroom practices" (p. 124). Ainscow's definition and features of moving schools are premised on the notion of problem-solving and staff collaborating to address the challenges of responding to student diversity. Problems posed by students with differing abilities are viewed as opportunities for staff learning, for asking questions about the way schools are organized, and for the focus of staff development. In short, this view is the same as the process of school improvement.

The Organization for Economic Cooperation and Development's (OECD, 1997) international report on implementing inclusive education used the term "integration" as a "process which maximizes the interaction between disabled and nondisabled pupils" (p. 15). According to OECD (1997), inclusive education is based on the inherent belief that children with disabilities need to experience and enjoy a quality of life in conditions which ensure dignity, promote self-reliance and facilitate active participation in the community. It creates equal educational opportunities for most students with special needs through normalized learning and social experiences in an environment equal to that for non-disabled peers.

Inclusion is a way of thinking and acting that permits individuals to feel accepted, valued and secure. An inclusive school community evolves constantly to respond to the needs of its members. An inclusive educational community is defined as "one that concerns itself with improving the well-being of each member, it is a value system based on beliefs that promote participation, belonging and interaction" (MacKay, 2006, p. 77).

The above definitions of inclusive education could be divided into two approaches, or beliefs about inclusion. Proponents are either pragmatic about the process or ethical in their views. Proponents of the pragmatic approach appear to define inclusion as a work in progress, more of a process than a product with an end point. Decisions about the nature and extent of inclusion of students with special needs appear to be based on the continuous improvement of the practices and the extent to which students benefit from instruction in the regular education classroom. These include: Alberta Education (2004) "specially designed instruction; " Ainscow's (1991) " process of increasing the participation of students;" and Mackay's (2006) "achievement of consistently better student outcomes for all students." Conversely, proponents of the ethical approach advocate that inclusion should be viewed as a moral imperative. These include: Ferguson (1995) "views diversity as the end that achieves a high quality education;" or OECD's (1997) "inherent belief that children with disabilities need to experience and enjoy a quality of life in conditions that ensure dignity, promote self-reliance and facilitate active participation." Biklen (1985), an advocate for full inclusion, provides another illustration. He argued that inclusion should be a goal, a value, and a decision on the basis of how we wish our society to look. The ethical approach is based on the belief that all students have a human right to belong together.

The literature contains many commentaries, reflections, and pronouncements that have served to highlight the extremes of the inclusion debate. For example, Fuchs and Fuchs (1994) examined the inclusive school movement, the respective advocates, goals and tactics. They argued that there are two distinct advocacy groups, the "high-incident" group and the "low-incident" group. The former group represented students with learning disabilities, behaviour disorders and mild/moderate mental disabilities. The latter group of advocates consisted of representatives for students with severe intellectual disabilities. These advocates argued for the elimination of a continuum of placements options and full inclusion as the only option as "eliminating special education will force general educators to both deal with children it has heretofore avoided and, in the process, to transform itself into a more responsive, resourceful and humane system" (p. 302). Fuchs and Fuchs agreed that general education's lack of interest in special education reform proposals resulted in the perception that special education was a separate concern and not the responsibility of general education. They further argued that the advocates for the inclusion of students with severe disabilities placed the inclusion movement at risk because these advocates radicalized the discussion of reform and became increasingly strident, insular and disassociated from the concerns of general educators. "Radical" was defined by Fuchs and Fuchs (1994) as "favoring extreme social changes or reforms" (p. 304). The goal of the full inclusionists was to eliminate special education so students with severe disabilities would be included in regular classrooms, whereas the goal of the continuum of placement option advocates was to seek "cooperation between special and general education" (p. 304) to increase the number of included students with disabilities. Fuchs and Fuchs (1994) were of the opinion that the philosophical positions and tactics used by both advocacy groups conflicted with each other and served to divide professionals and parents. This article raises the issue of whether there is one inclusion movement addressing the needs of all students or whether there are two or more movements addressing the needs of distinct groups of students. In the conclusion of their article, Fuchs and Fuchs noted it was time to hear from the "inventive pragmatists" (p. 305) regarding inclusion. Such advocates were needed to move inclusion forward and described as those who provided leadership that

> recognizes the need for change, appreciates the importance of consensus building, looks at general education with a sense of what is possible, respects special education's tradition and values and the law that undergrids them, and seeks to strengthen the mainstream, as well as other educational options that can provide more intensive services, to enhance the learning and lives of all children. (p. 305)

In order for inclusion to become a reality for students with mild disabilities, Reynolds, Wang and Walberg (1987) contended that certain changes were needed.

One major flaw of special education was the way students are categorized or labeled. These researchers found little evidence to justify the practice of categorizing students and programs. Reynolds, Wang and Walberg (1987) concluded that it is "the flawed system" (p. 394) not the students that is in need of change. They recommended the joining of demonstrably effective practices from special and general education to establish a general education system that is more inclusive and that better serves all students while at the same time not losing legal rights of students and parents to due process and to Individualized Educational Plans (IEPs).

The attitudes and beliefs of teachers have changed over time. In the past, few teachers were equipped and willing to provide the degree of individualization and differentiated instruction needed to respond to student diversity (McLaughlin & Jordan, 2005). Recent research has found that regular classroom teachers' ability to teach in inclusive classrooms was more a result of actual teaching experiences, and collaboration with others, than of more information or resources (Rombach, 2005). These skills of teachers, and additional support by outside agencies, have been found to benefit all students – disabled and non-disabled (OECD, 1999).

If the literature shows no consensus on the meaning and practice of inclusion, we may never know what it should look like or agree that it is fully in place in schools. Inclusive programming is based on the values and beliefs that students with special education needs belong and have a right to participate fully in a regular classroom with age-appropriate peers. Placement in a regular classroom is not always contingent on the student's ability to meet specific grade-level or behavior expectations. It may be based on the acceptance of and accommodation made in the regular classroom environment to meet the social needs of a student with a disability. This is reflected in the recommended practice of bringing special services and supports to the child in the regular classroom instead of removing the child to provide such services.

There is a tendency to think of inclusion as being concerned only with students with disabilities, or others categorized as having "special educational needs." The inclusive school adapts itself to the full diversity of student ability, learning needs and culture among all the children (OECD, 1999). Inclusive schools treat all students as equal members of the student population rather than singling out a subset to require special treatment. Inclusive education is not simply involving the movement of students from special education classrooms to regular education settings. It requires continual instructional improvement and increased organizational capacity of schools to accommodate the diverse learning needs of all students.

Inclusive education is also the recognition and valuing of diversity in education systems but its scope varies as illustrated in the definitions cited. Practices that are labeled inclusive are varied in scope. It is common to talk about the development of inclusive education as if it were "a race toward a single, clearly defined and consensually understood finishing post" (Artiles & Dyson, 2005, p. 57). Schools with successful inclusive education programs are cooperative organizations that continually strive to find the right solutions (OECD, 1997). Dyson and Millward's (2000) case study of four English schools pursuing inclusive education focused on how regular schools responded to the diverse learning characteristics of students and the ways in which the schools used the concepts and practices of "special needs" education to respond to this diversity. In these four cases studied, the schools were transforming themselves in similar ways: staff conceptualized their approaches in terms of responding to student diversity as a whole rather than simply as a response to special needs; special education technology was merged into regular classrooms through the use of teaching assistants and differentiated instruction; and redefined the role of the special needs coordinator into that of a facilitator. Inclusion was defined in terms of how to educate all students with diverse learning needs. The factors that resulted in these schools becoming more inclusive, or caused the schools to become inclusive, were not clear. Dyson and Millward (2000) found themselves unconvinced that inclusion is a simple concept "unequivocally yielding unproblematic practices" (p. vii). Government policy encouraged schools to extend their existing provisions to accommodate students with disabilities. The schools in this study developed exemplary inclusive practices quietly, not because of the force of the governing policy.

Idol (2006) evaluated inclusive programs in four elementary and four secondary schools in a large school district in the United States. The purpose of program evaluation was to examine the extent of inclusive practices and describe how special education services were provided. Staff perceptions were gathered from personal interviews with teachers, assistants and school principals. Inclusion was defined as the students attending age-appropriate general education classes on a full time basis. Special education services included consulting teachers, cooperative teaching, resource programs and instructional assistants. The findings of this study found educators to be positive about educating students with disabilities in general education settings. More importantly, as teachers gained more experiences with inclusion, their acceptance of students and support for inclusion increased.

Inclusive education is the recognition and valuing of diversity in general education but its scope varies as illustrated in the definitions cited. Practices that are labeled inclusive also varied in scope. The challenges of inclusive education draw attention to the need to clarify thinking about what inclusive education is and what constitutes effective inclusive practices. The participation of all students with special needs in the culture, curriculum and community of schools has been both successful and difficult. This becomes a concern for local schools and teachers. Given the many competing definitions of inclusive education, it is difficult to disentangle the evidence from advocacy in order to determine how to be more successful and sustain best practices. If inclusive education is to continually create equal educational opportunities for students with special needs, normalized learning and social experiences in an environment equal to that for non-disabled peers are needed. Inclusive education should be based on the values and beliefs that children with disabilities need to experience and enjoy a quality of life in conditions that ensure dignity, promote self-reliance, and facilitate active participation in the community.

Inclusion is also a process and includes seeking continuous improvement. From this view, Ainscow's (1991) definition of inclusion as "a process of increasing the participation of students in and reducing their exclusion from the cultures, curricula and communities of their local schools" (p. 218) has the most pragmatic value for the purpose of this study. Inclusive education should be focused on overcoming barriers to participation that may be experienced by any student. To address an ever-increasing diverse range of needs, educators need to focus on the processes involved with educational planning, curriculum development and school organization. Thus the diverse learning needs of all students, including those who live in poverty, have English as a second language or who are new to Canada can, be better met as a result of inclusive practices. This study aims to clarify some of the issues by identifying the factors that promote successful inclusion and in particular, maximized the participation of all students in their cultures, curricula and school communities.

Challenge of Inclusive Education

Since 1992, Alberta teachers have publicly and passionately voiced concerns on a number of issues in public education, including their frustrations with the integration of students with special needs without support or services as evidenced in the various reports (Alberta Teachers' Association, 1992, 1997; Alberta School Boards Association, 1997; Special Education Council, 1996, 2000). Teachers' biggest concerns were trying to teach students with special needs in regular classrooms without teacher training, and classroom supports.

Supporting Integration (Alberta Education, 1995) was the report with which both stakeholder groups held the government accountable. This report was commissioned by Alberta Education to study integration practices across Alberta. Superintendents of school jurisdictions were surveyed to determine the nature and extent of integration practices. Based on a superintendent's recommendation, six case studies of schools were conducted and detailed information was obtained from staff, parents and students. Based on a literature review and findings from the case studies, factors were identified that, if present on a consistent basis, were associated with greater success for students in an integrated environment. Of the 19 factors identified, four were directed at the jurisdictional level (i.e., adequate physical and human resources; training for regular classroom teachers; and written policy on integration) and 15 were directed at the school level (i.e., principal support; teacher support; parent involvement; written policy/mission statement; guidelines for integration; formal communication system for parents and teachers; reduced class size; regular teacher training in special education; regular teachers responsible for individualized program plans; high school life skills programs; teacher planning time (annual and weekly); students in regular and special education are prepared for integration).

This report concluded that all six case study schools were in a developmental phase, and none represented a fully integrated model. Schools that represented best practices for integration had more factors in place than other schools. Factors frequently found in each of the six cases studied were: a written jurisdictional policy on integration; principal support/involvement; a formal communication system for teachers; preparation of regular students for integration; and a high school life-skills program. Factors infrequently present were: regular classroom teacher training in special education; training on inclusion; teacher support/involvement; a school mission or policy statement; guidelines; regular teachers trained in special education; regular teacher responsibility for individualized program plans; and annual and weekly planning time for teachers. One factor never present in the six schools was reduced class sizes when students with special needs were integrated.

The report concluded that some of the critical factors were evident in schools but that others seldom were. The researcher concluded that none of the inclusive programs reviewed provided a complete model for integration (Alberta Education, 1995). In addition, if a school jurisdiction provided resources, success with inclusive education hinged on teacher and principal support, and time for program development.

Following the release of this Government report, the Special Education Council of the Alberta Teachers' Association conducted a follow-up survey of its membership in 1996 and again in 2000. The Council asked teachers to indicate which of the supporting factors identified were actually in place to an adequate degree. Responses to the Council's survey indicated teachers' support for inclusion, but only three out of the 19 factors were identified as adequate or in place (i.e., teacher, principal and parent support for inclusion). Seventeen of the 19 factors were rated as inadequate or not in place (e.g., training, planning time, reduced class size, life-skills programs) or required more support (e.g., regular teachers completing individualized program plans, policy or guidelines, preparing communication system between parents and teachers, and adequate resources and training). The findings of the Special Education Council support the other stakeholder reports in that teacher support for inclusion exists but supports for teachers do not.

In 1997, the Alberta Teachers' Association (1997) and the Alberta School Boards Association (1997) released their respective reports about of inclusion students with special needs in regular classrooms. The Alberta Teachers' Association *Report of the Blue Ribbon Panel on Special Education* (1997) was a review on the extent to which integration of students with special needs into regular classrooms was consistent with government policy. This review was prompted by teachers' concerns and the need for supports. The Blue Ribbon Panel set out to bridge the gap between the situation that teachers described in surveys and the conditions and structures characteristic of successful inclusive programs. The Blue Ribbon Panel examined Alberta Education's (1995) own study, *Supporting Integration: A Work in Progress.* The panel identified a gap between elements of existing and successful programs. Among the key recommendations were that the Department of Education incorporate into its own policy and guidelines the 19 critical factors for successful integration, and that school boards and professional associations develop policy to address the 19 factors and develop guidelines for allocating resources and supports for programming for students with special needs. Recommendations in the *Report of the Blue Ribbon Panel on Special Education* included the need for increasing leadership by government, school boards, and schools; developing standards for programs and services; providing sufficient funding to support students with special needs; and coordinating services.

The Alberta School Boards Association (1997) released its own report, *Task Force In The Balance: Meeting Special Needs Within Public Education,* This task force gauged public opinion about programs for students with special needs and the effect of programs on public education. It also attempted to showcase exemplary inclusive education programs across the province. The Alberta School Boards

Association found the same support for inclusive education as the Alberta Teachers' Association (1997). The philosophy of inclusion is "being embraced, provided the necessary resources are in place" (p. 6). Key recommendations included: that the "government provide sufficient funding to support the structures that are essential to an effective inclusive education system outlined in Alberta Education's *Supporting Integration"* (p. 23); "principals and teachers exhibit a commitment to accepting every child into the school system, and to acknowledging each child as being of equal value" (p. 24); "principals and teachers embrace the philosophy of inclusion" (p. 24). This report, along with the Alberta Teachers' Association report, highlighted the importance of and support for the government's study *Supporting Integration: A Work in Progress* (Alberta Education, 1995).

In 1999, Alberta's Minister of Education had conducted a provincial review of the delivery of special education programs and services in response to concerns expressed by parents, students, the public, partners, and stakeholders. The concerns were specific to access to, and delivery of, quality programs and services for students with special needs, accountability for outcomes, and other administrative requirements. *Shaping the Future for Students with Special Needs: A Review of Special Education in Alberta* (Alberta Learning, 2000) contained 66 recommendations in seven key areas: accountability, administration, funding, professional development, communication/information, resources, and policy. This review of special education did not include any reference to the placement or inclusion of students with special needs, adequacy of funding, or any of the previous provincial reports related to the challenges of including students with special needs.

This is of particular interest to this study because of two prominent provincial reports that preceded government's review. These prominent reports highlighted stakeholders concerns, in particular concerns expressed by teachers and public school trustees, on the lack of supports provided to support government's policy on placement of students with special educational needs in regular classrooms.

The most recent review of the public education system was conducted in Alberta between 2002 and 2003. The Government of Alberta commissioned this extensive review in response to concerns expressed by education stakeholders and the recent provincial teachers' strike. The Commission on Learning's mandate was to "provide recommendations and advice to the Minister of Learning on ensuring a sustainable basic learning (or kindergarten to grade 12) system that supports the life long learning needs of students and the societal and economic well-being of the province" (p. 20). A total of 94 recommendations were contained in the final report, called *Every Child Learns, Every Child Succeeds: Report and Recommendations* (Alberta Commission on Learning, 2003). This report recognized that Alberta "classrooms included a rich diversity of students with a wide range of abilities, interests, backgrounds, languages, cultures and religions" and "include children who are gifted or who have special talents, children who have mild and moderate disabilities and those who are severely disabled" (p. 80).

The Commission on Learning reported that, between 1995-1996 and 2000-2001, the number of students identified with severe disabilities "increased 64% while the overall student population increased 5%" (p. 89). Seventy-eight percent of regular classrooms had students with special needs. On average, in a class of just over 24 students, "three had mild or moderate needs and one had severe special needs" (p. 89). Concerns about the adequacy of supports for teachers were reported but, despite these concerns, those involved in the education system consistently expressed strong support for including students with special needs in the school system. Underlying the Commission's vision was a clear commitment that Alberta's schools should "welcome all students and that all students should have the opportunity to learn and succeed" (p. 90). "When children are integrated into regular classrooms, it is essential that adequate support be in place for the children with special needs, their teachers, and for the sake of the other children in the class" (p. 90).

A number of recommendations were made by the Commission. For example, Recommendation 42 stated, "Ensure that adequate supports are in place when children with special needs are integrated into regular classrooms" (p. 90). Adequate support included access to professional support for assessment, appropriate learning resources, paraprofessional support, coordination of services, adequate time for teachers to organize and plan programs, and smaller class sizes. Recommendation 44 stated, "Provide classroom teachers with adequate support to develop and implement individual program plans for children with special needs" (p. 91). Support included principals providing time for teachers to plan, monitor, work with other professionals and paraprofessionals, and assess the progress of special needs students.

As of October 2005, Alberta Education's status report on the Commission's recommendations, although accepted by Government, shifted the responsibility to school boards. "School boards are implementing strategies to provide teachers with guidelines to assist them in determining adequate supports for students with special needs in an integrated setting" (p. 18). "School boards will ensure an Individualized Program Plan (IPP) is developed, implemented, monitored and evaluated for each student identified as having special needs" (p. 19). The Government's expectation that school boards be responsible for implementing the Commission's recommendation was based on the amount of funding already provided to school boards to support students with special needs. The Government highlighted in the status report that it was the school boards' responsibility to meet the Alberta Education (2004) *Standards for Special Education*, a Ministerial Order having the same effect as regulation.

Policy on Inclusive Education

There is no provincial policy specific to "inclusive" education in Alberta. The policy that began inclusive education in the Province of Alberta began with a policy on the "placement" of students with special needs. This was first introduced to school boards on September 28, 1993. Alberta Education (1993) released the policy on the educational placement of students with exceptional needs, which contained the following policy statement:

> Educating students with exceptional needs in regular classrooms in neighbourhood or local schools shall be the first placement option considered by school boards, in consultation with students, parents/guardians and school staff. (p. 1)

Upon release of this policy, the Minister of Education stated, "The placement of students with exceptional needs must be based on principles of equality, sharing, participation, and the worth and dignity on individuals" (p. 1). The principles underlying the placement policy were: the individual needs of each student must be the primary focus in providing education to students; program options and supports should be provided where needed to meet the diverse and unique needs of each student; and parents or guardians and students must have appropriate and meaningful participation in placement and program decisions (Alberta Education, 1993). In a letter to school board chairpersons, superintendents, principals and directors/administrators of special education, the Minister of Education wrote

> Our goal is clear: to provide all students, including those with exceptional needs, with adequate education programs that meet their unique needs…These are the main principles underlying this policy: a regular classroom setting should be considered as the first placement option for exceptional students…Teachers need assistance in the classroom to meet the non-instructional needs of students. The first option of placing exceptional students in regular classrooms in neighbourhood schools is a major challenge. It will require a combination of desire, determination, time and resources. (p. 1 – 2)

The Educational Placement of Students with Special Needs (Policy 1.10.1, Alberta Education, 1993) stated that, "school boards are ultimately responsible for making placement decisions that are in the best interests of individual children and of all the children they serve" (p. 1). This policy defined students with exceptional needs as students described as

> Students with exceptional needs mean being in need of special education programs because of their behavioral, communicational, intellectual, learning or physical characteristics, or students who may require changes to the regular curriculum, staffing, instructional strategies, facilities or equipment, or students who may require specialized health care services. (p. 1)

In the procedures section of this policy, school boards were held responsible for providing teachers of students with exceptional needs with adequate learning resources and other classroom support, as well as appropriate in-service training and access to professional development opportunities (procedure 9). Alberta Education's existing funding grants to school boards were to be used to support the placement of students with exceptional needs. With the release of this policy, school boards were provided flexibility in making decisions about programs (procedure 11). Additional provincial funding, training, or resources to support the implementation of this policy were not provided to school boards.

The *Guide to Education for Students with Special Needs* (Alberta Education, 1997) followed the placement policy and included special education program standards and expectations. This *Guide* was intended to bring consistency in special education programming across the province and to guide development of school board policy. In 2004, Alberta Learning replaced this *Guide* with *Standards for Special Education* and elevated the requirements for programming for students with special education needs to a Ministerial Order (#015/2004). A shift in focus occurred from placement, or setting, to the importance of instruction. "Instruction, rather than setting, is the key to success and decisions related to placement, are best made on an individual basis, in a manner that maximizes their opportunity to participate fully in the experience of schooling" (p. 1). Inclusion was defined as "specially designed instruction and support for students with special education needs in regular classrooms and neighbourhood schools" (p. 1). The *Standards* required school boards to identify and deliver effective programming for students with special needs in grades 1-12. It further promoted consistent and enhanced quality of educational practice in Alberta so that, irrespective of location, students with special education needs could access appropriate programming and services. Sixteen standards outlined the requirements of school boards regarding the delivery of education programming and services. *Standards For Special Education* (Alberta Education, 2004) state what school boards must do, which include

- ensure that educating students with special education needs in inclusive settings in neighbourhood or local schools shall be the first placement option considered by school boards, in consultation with parents, school staff and, when appropriate, the student (Standard 10(a), p. 10);
- provide teachers of students with special needs with relevant resources and access to professional development opportunities (Standard 11.c, p. 10);
- ensure each school has a process and learning team to provide consultation, planning, problem-solving, relating to programming for students with special education needs (Standard 11.e, p. 10).

Current policy in Alberta does not mandate inclusive education and permits a broad interpretation of student placement. The above policy statement, or standard, implies a choice. Clearly defining inclusive education is important to achieving the intent and purpose of government policy on the placement of students with special needs into regular classrooms.

The Province of Manitoba introduced a legal obligation to provide appropriate educational programming for all students, particularly students with disabilities. In November 2003, Bill 13: *The Public Schools Amendment Act (Appropriate Educational Programming)* was introduced by the Manitoba government. In June 2004 this Bill received Royal Assent, yet has not come into effect. This amendment affirms that all students in Manitoba are entitled to receive appropriate educational programming that fosters their participation in the learning and social life of the school. This amendment provides legislated support for the philosophy of inclusion (Manitoba Education, Citizenship and Youth, 2006). This legislation also demonstrates government's intent to set regulations and others supporting mechanisms such as policies, guidelines, protocols and support documents, to help all students receive an appropriate education. The challenge, as stated by Manitoba Education (2006) is that ultimately, appropriate educational programming is more than words. It is "a fluid, collaborative process where school communities continually strive to provide appropriate programming and services that respond to the learning and social needs of all students, in a climate that is beneficial to all." (p. 10).

With a clearer definition and policy goal, the research base can provide much needed evidence on what schools need to do to become more inclusive and in particular, maximize the participation of all students in their cultures, curricula and communities. Practices in schools are both informed by and influenced by policy statements. The relationship between the policy and values, or beliefs, about inclusion is not straightforward. Without a clear definition or policy directive, the implication is that schools have a choice to adopt inclusion and do not have to adopt practices that include students with special needs in regular classrooms.

Legal Precedents for Inclusive Schools

Special education systems were developed in order to care for those children who stretch regular education provision to the point where additional resources must be made available to provide the extra support needed for efficient learning (OECD, 1999). There has been a steady increase in inclusive education as a result of equity and human rights challenges, parental attitudes, teacher training and research.

A student's educational placement is determined through the legal requirement to identify students as having "a special educational need." Identification is the responsibility of the school board and entails designating or coding the student according to special education eligibility criteria and categories. Resources are then tied to diagnosis and appropriateness of programming, and services are outlined in an Individualized Program Plan (IPP), which is the student's special education program. Alberta's *School Act* (Province of Alberta, 2004) defines a "special education program" under the section on the provision of education and associated services. Section 47(1) of this *Act* states, "A board may determine that a student is, by virtue of the student's behavior, communicational, intellectual, learning or physical characteristics, or a combination of those characteristics, a student in need of a special education program." Before a board places a student in a special education program, it must "consult with the parent of that student, and where appropriate, consult with the student" (Section 47(3), *School Act* (2004).

The right to a fully inclusive education program is not guaranteed in law or policy. Although legislation must provide for a system of education, the system must evolve from a need to meet a stated purpose of education and to recognize and respond to the individual needs of the students, the parents, and the larger society. In effect, the province has established a trust relationship with school boards to carry out its assigned duties. However, as part of its constitutional responsibility for education, the province must safeguard the public interest in creating and protecting individual rights and interests, particularly those of children (Alberta Education, 1985). Although all students have particular needs, the educational system recognizes the special needs of some students. Such students can be found on a continuum from severe multi-handicapped, physically or learning disabled, cognitively disabled, emotional or behavior-disordered to the gifted, each with particular and varying educational needs. To meet individual programming needs, government allocate special education funding to school boards to assist them in meeting their responsibility to support students' special needs over and above the individual needs of all students.

Including and educating students with disabilities in mainstream schools should be an important policy goal (OECD, 1999). If the goal of education is to provide every pupil with the opportunity to reach his or her full potential, then students with disabilities must be provided the same opportunities accorded to non-disabled pupils. Students with special needs will almost always be found to be "handicapped" or "disabled" in human rights legislation. To date, the leading legal case in Canada on special education placement is *Eaton vs. Brant County Board of Education*, which was heard by the Supreme Court of Canada on October 8, 1996 and the reasons were delivered on February 6, 1997. This precedent-setting case was argued on whether placement in special education class and the process of doing so, absent parent consent, violated the student's equality rights. Emily Eaton, an Ontario elementary school student with cerebral palsy, had intellectual and physical disabilities and could not communicate clearly. She spent three years in a regular classroom until school authorities decided it was not in her best interests for her to remain there. Her parents disagreed. An Ontario Education Tribunal then ordered her to be placed in a special class. The Ontario Court of Appeal decided that this ruling violated Emily's equality rights under section 15 of the *Canadian Charter of Rights and Freedoms*. The Supreme Court of Canada disagreed and rejected the idea that there should be a legal presumption in favor of inclusion. However, the Supreme Court held that the normal starting point for any consideration of the presence of a disabled student in a classroom should be in an integrated classroom because of the potential benefits. This decision addressed the question of whether identifying or designating a child with a disability as being an identifiable member of a predefined group results in attributing to the child a set of "stereotypical characteristics" and whether such attribution is discriminatory (McLaughlin & Jordan, 2005, p. 97). The Supreme Court supported neither the identification nor the placement criteria used by the province, but proposed a third criterion for providing resources to students with disabilities. The Court determined that the *Charter* clearly provides for the equality rights of exceptional students by requiring differences in treatment where necessary to ensure equality of outcomes. The ultimate test of inclusion must be a determination of the appropriate accommodation for an exceptional child. It must be from a subjective, child-centered perspective, one that attempts to make equality meaningful from the child's point of view (*Eaton v. Brant County of Education,* 1997). The terms of appropriateness and accommodations are to be applied to the individual child in the individual circumstances in which that child is located. It is not to be viewed as endorsing any particular placement, program or service (McLaughlin & Jordan, 2005). Interpreted another way, being identified as having a special education need does not guarantee any right to an inclusive education. A focus on identification is only the means to qualify for additional resources or supports.

The Supreme Court made a statement in favor of integration and recognized that integration offers educational benefits that cannot be found in segregated settings. The Court's decision in *Eaton* recognized that, unlike other protected grounds, disability means vastly different things depending on the individual and the context. A student's disability may act as a barrier to his or her ability to profit from education in the regular classroom without adaptation and modification of curriculum or the method of instruction. The barrier is the "failure to make reasonable accommodations, to fine tune society so that its structures and assumptions do not result in the relegation and banishment of disabled persons from participation" (Supreme Court of Canada, 1997a, para. 67). The real problem is the structure of society that presents a significant barrier to the full participation of people who are disabled rather than the disability itself.

The issue of discrimination against people with disabilities was also argued in the decision of the Supreme Court of Canada (1997b) in *Eldridge v. British Columbia (Attorney General).* In *Eldridge*, the Court held that, where a government makes medical services available to the public at large, it has a positive duty to provide effective communication to those with hearing disabilities through the provision of interpretive services. Failure on the part of the government, or its agencies, to provide such services discriminated against people who are deaf and need a service that is typically available to the public. The Court found the disconnection between a specific government policy to provide a health-related service and the failure of health-care staff to provide sign language interpreters to people who were deaf. This action resulted in discrimination. In this case, the appellants were not provided "equal benefit" of the law without discrimination (p. 19). Such discrimination had adverse effects and therefore offended section 15 of the *Canadian Charter of Rights and Freedoms*. The Supreme Court of Canada relied on its arguments presented in *Eaton* to support its decision in *Eldridge* (p. 21, para. 65). Although Eaton involved direct discrimination, the adverse effects suffered by deaf persons stem from the failure to ensure they benefit equally from services offered to everyone (p. 21, para. 66).

The *Eaton* and *Eldridge* cases confirm that it is important to take into consideration the individual characteristics of persons with disabilities in order to avoid discrimination. It is the failure to make reasonable accommodations that result in discrimination. This is persuasive in recognizing equality as meaning full membership in the community. Such a view rests on the notion of "belonging" as central to the concept of the community in which people live and of which everyone is treated as an equal member (Manley-Casimer, 1999).

Equal access to educational opportunities for students with special educational needs and the determination of appropriate education are determined largely by how students are assessed and placed, and how and to what extent services are delivered by local school boards. This is where inclusion happens and where the local school's acceptance of students with special needs can be truly examined. A student's particular potential cannot be determined solely on the basis of a diagnosis or special education label, but on the basis of what is an appropriate education and what is the benefit of the educational services provided.

Reasonable accommodations should be the standard procedure used to fulfill the purpose of inclusive education. The analysis of reasonable accommodation comes after "an institution has examined its goals, purposes, and procedures for their congruence with equality provisions" (MacKay, 2006, p. 27). Reasonable accommodation goes to the heart of equality, to the examination of how institutions and relationships must be changed in order to make appropriate accommodations available for the many diverse groups of students. Simply accommodating students with disabilities seems to mean that we do not change procedures or service delivery; we simply make concessions to those who are different rather than working toward genuine inclusiveness. Accommodation does not challenge deep-seated beliefs about responding to diversity and disability, as its goal is to try to make different people fit into the same system (Day & Brodksy, 1996).

MacKay and Burt-Gerrans (2004) argued that schools have an important socializing and citizen-building agenda as well as an academic focus for our multicultural population. An assessment of accommodation should focus on an examination of the structure and assumption of the mainstream. This would result in more substantive equality and shed more light on the failures of accommodation efforts. Simply placing a student with disabilities in a mainstream setting, even with additional support, without altering, adjusting, or examining the effect of the mainstream structure, does not create an inclusive educational environment. Accommodation efforts must transcend formal equality provisions and challenge the existing mainstream structures to bring us closer to the goal of a quality public education system that supports the full spectrum of student diversity.

The legal requirements and precedents present an agenda for public authorities to reduce the exclusion of people with disabilities from schools and services available to the public. The process of including students with special needs in regular education focuses on providing a sense of belonging and determining appropriateness of supports based on individual needs. These reflect the value of inclusion and the right to be provided equal treatment.

Definition of Safe Schools

The terms *safe schools* and *school violence* were used to search the literature. The lack of consistent terminology and concise definition made it difficult to establish a clear picture of what constitutes a safe school. To develop a broader understanding of what constitutes a safe school, definitions of violence in general are used to illustrate what violence in schools looks like. It is important to distinguish between *school* as a physical location for violence that has its roots in the community and *school* as a system that causes or exacerbates problems that students experience.

The World Health Organization (WHO), (2002) defined violence as "the intentional use of physical force or power, threatened or actual, against oneself or another person, or against a group or community that results in or has a high likelihood of resulting in injury, death, psychological harm, maldevelopment or deprivation" (p. 5). The concept of intention is a key element in this definition. Another important concept is the use of power. Violent acts may also include threats and intimidation as well as the use of physical force. Bullying is an example of threat and intimidation, and it thrives when it silences the victim and develops apathy in the observers.

As children move through adolescence and schooling, aggression takes on different manifestations and functions. For example, girls seem to specialize in a covert form of social hostility called relational aggression, which involves trying to harm another person's social relationships or reputation (Lawson, 2005). Aggression refers to less extreme intentional behaviors that may cause psychological or physical harm to others (Orpinas & Horne, 2006). Hitting, pushing, isolating a person on purpose, and name-calling are examples of aggressive behaviors. Bullying is considered a subset of aggression as the bully commits aggressive behaviors repeatedly and intentionally, and it is most likely to occur in social situations when peers are present.

Adolescents' self-absorption and sensitivity to the views of others means that acceptance by a peer group takes on increased importance. This is best illustrated in the study of serious school violence involving recent school shootings. The National Research Council and Institute of Medicine (2003) conducted a study on the circumstances of serious school violence, particularly those that led to a number of school shootings in the United States and Canada from 1992 to 2001. The limitations of the available evidence in each case studied made it impossible for the committee to reach firm, scientific conclusions about either the causes or consequences of the shootings in rural and suburban schools or the most effective means of preventing and controlling them. However, in each case, the committee did find a significant gulf between the communities' youth culture and that of adults. Parents and most teachers had a poor understanding of the shooter's experiences in social situations, including at school and their interpretations of those experiences. The perpetrators of the shootings were intensely concerned about their social standing in their schools and among their peers. In almost all the school shooting cases, youth had hinted at what was to come; parents and teachers were mostly unaware of the status of problems they were experiencing and of their almost universal belief that the youth had nowhere to turn. For some, their concern was so great that threats to their status were perceived as threats to their very lives, and their status was to be defended at all costs.

The Comprehensive Health Education Foundation (CHEF) (1997), a group based in Seattle, argued that violence is about norms, which are individuals' attitudes and behaviors but also individuals' perceptions of others' attitudes and behaviors. For example, if you are a grade 8 student and you see other students cheering on a bully on the playground and you do not see a teacher or hear an adult say a negative word about bullying, you would most probably come to believe that bullying is fun, bullying makes you popular, and adults condone such behavior. These beliefs arise as a direct result of the child's experiences. If the child repeatedly experiences such events, he or she perceives that other students and adults share the beliefs, and the beliefs become valid. These experiences feed on one another in an ever-escalating spiral of aggression and violence. Soon it does not matter what the child believes: what matters is what the child thinks everyone else believes. The child has subordinated her or his attitudes and behaviors to the group's norms. Because the norms fuel the violence, the norms must be targeted for change. Effective violence prevention programs focus on changing norms.

The school is important arena for change because it is where young people spend a large part of their lives, many beliefs about violence are fueled, and school-based programs have the potential to be effective for a greater number of children. Most violent behavior in school is not the gross behavior of someone beating someone else up. It is more likely to be shoving, tripping, hitting, slapping, spreading vicious rumors, publicly humiliating someone, kicking or bullying, and other small incidents that go unnoticed, unreported, and without consequence to the perpetrator. The effects of violence are much more insidious than broken bones and lost lives. Research has shown that the major effects of violence on young people include young people becoming less likely to help victims, desensitized to violence, more fearful and distrustful, and more violent (e.g., Olweus, 1991; Pepler, Craig, Ziegler, & Charach, 1993; Smith et al., 1995; CPHA, 2004).

It is evident that students in schools are experiencing a different form of violence than what adults traditionally view as violent behaviors. Aggressive behaviors aimed at intimidating another person psychologically; discrimination or disregard for differences; and lack of appropriate systems for channeling anger, frustration, and conflict should be considered forms of violence (Camargo-Abello, 1997). A definition of school violence should include those behaviors that seriously disrupt the teaching and learning environment of a classroom or school. The definition should also include nonphysical acts such as verbal harassment, bullying, intimidation, and/or exclusion by a peer group. Recognizing the nonphysical aspects of violent behaviors provides support for victims of school violence and seeks to reduce or eliminate the serious effect of violence on some students. A poor school climate, negative teacher-student relations, and unclear or inconsistent enforcement of rules are associated with increased youth violence in schools (Council of Europe, 2003). The school climate is important as the cause of school violence can occur in the context of the school, and educators have the potential to influence the outcomes. Recognizing that school violence is an educational problem allows the solution to become the responsibility of the school. The real extent of violence in schools and a concise definition was difficult to ascertain in the Canadian literature as researchers use varying terms for varying reasons. For example, under Ontario's Violence-Free Policy,

> A safe school environment should be free from abuse, bullying, discrimination or other unacceptable behaviors, have staff who acknowledge and reward positive behavior; employ discipline strategies which are fair and nonviolent; promote a sense of responsibility and empowerment; foster achievement and wellness in all students; encourage participation in extra-curricular activities; and invite parental and community involvement. (Ontario Ministry of Education and Training, 1994, p. 1)

Various task forces and researchers across North America indicate that safe schools share the following characteristics: a climate that nurtures caring and peaceful relationships; teaching and learning that demonstrate understanding and sensitivity for cultural diversity; staff and students who feel safe from physical and psychological harm; and staff and students who feel they are part of a community (Alberta Education, 1999). The Alberta School Boards Association (1994) first characterized a safe and caring school with the following attributes: caring; common values and beliefs; respect for democratic values, rights and responsibilities, cultural diversity, law and order, and individual differences; common social expectations; clear and consistent behavioral expectations; appropriate and positive role modeling by staff and students; effective anger management strategies; and community, family, student, and staff involvement.

Alberta's Safe and Caring Schools Initiative consists of a number of projects and is supported by all major education partners. To foster congruence within projects and between partners, Alberta Learning (1999) developed the following definition of a safe and caring school, which is used for the purpose of this study:

> A safe and caring school environment as physically, emotionally and psychologically safe place for students and staff … [It] is an environment wherein all are accorded respect and dignity, and their safety and well-being are paramount considerations. (p. iv).

Caring is defined as "watchful attention, concern, custody, diligence, direction, to be concerned with and attend to the needs of others" (Alberta Education, p. 48). Safe is defined as "untouched or not exposed to danger, secure from damage, loss or harm" (Alberta Education, 1999, p. 48).

MacDonald (1997) defined violence in schools as: "The actual or threatened use of physical, verbal, sexual or emotional power, intimidation, harassment, by or against individuals or groups which results in physical or psychological harm, or both, or is harmful to the social well-being of an individual or group" (p. iv). Alberta Education (1999) recognized school violence is more than a physical form. They defined violent behaviors to include nonphysical acts such as verbal harassment, bullying and intimidation by a peer group and have implemented a number of programs to foster and maintain a safe and caring school environment.

The best way to prevent bullying and school violence is to create school communities that are committed to the safety and acceptance of all students. Olweus' (1993) research in Sweden found that the key to reducing bullying in schools was a clear policy with consistently applied consequences. Where there are supportive relations among school staff, warm relations between staff and students, shared decision making, and where adults model cooperation and conflict resolution, there are fewer bullying behaviors.

Challenge of Safe Schools

Alberta's Commission on Learning (2003) *Every Child Learns, Every Child Succeeds: Report and Recommendations* included a recommendation (#24) that all schools "encourage positive attitudes, good behavior and respect for others, provide a safe environment for students, and address incidences of disruptive behavior when they occur" (p. 78). In support of this recommendation, the Commission stated that

> Every child should be able to go to school without worrying about whether he or she will be the victim of bullying, harassment or violence. For the most part, Alberta's schools are safe and secure places for students. But there have been serious concerns with bullying and increasing incidences of unacceptable behavior in our schools and across the country. (p. 78)

The Commission acknowledged that many schools have taken steps to address these problems through initiatives such as Safe and Caring Schools and Effective Behavior Support (EBS) programs. "The key is that unacceptable and threatening behavior cannot be tolerated in Alberta schools" (p. 79). The Commission stated that schools should reflect the values outlined in their report; "We expect schools to reinforce certain values in every child, including … courtesy, honouring rights of others, being accountable for their actions, being sensitive to the needs of others, ensuring truthfulness, maintaining a positive attitude" (p. 51). This report highlights the importance of reducing bullying and providing a safe and caring school environment in Alberta schools.

Bullying is a form of aggressive behavior where the bully has more power than the victim, and uses this power aggressively to cause distress to the victim through physical and verbal behaviors (Hawkins, Pepler, & Craig, 2001). Bullying has been found to be common in schools. Ten to 15 percent of students admit to being involved in weekly physical bullying, either as bullies, victims, or victim-bullies (Olweus, 1991; 1993). This form of bullying typically peaks in Grades 6 to 8. Boys are almost twice as likely as girls to report frequent physical bullying, but both sexes are equally likely to report frequent victimization (Craig & Yossi, 2004; Sourander, Helstela, Helenius, & Piha, 2001). Roughly 10 to 15% of students report involvement in weekly verbal bullying (Solberg & Olweus, 2003).

One Canadian study on the nature and extent of bullying in schools, found 41% of students who reported that they were victims or bullies monthly. Seven percent said that they were victimized weekly, and two percent reported that they bullied other students socially every week (Totten, Quigley, & Morgan, 2004). In another recent Canadian study on Internet bullying, 13% of students reported they were victims or bullied electronically and high school students were most likely to be involved (Totten, Quigley, & Morgan, 2004). Bullying has been recognized as a widespread, persistent, and serious problem in our schools (Olweus, 1991; Pepler, Craig, Zielger, & Charach, 1993; Totten, Quigley, & Morgan, 2004). In a pan-Canadian study involving 555 Grades 6 to 10 Canadian students, the association between bullying, power, and social status was examined. The results of this study indicated that a substantial number of bullies were seen as both popular and powerful, with leadership qualities, competence and assets (Vaillancourt, Hymel, & McDougall, 2003).

Bully-victim problems, sexual harassment, and racial discrimination have become major public health concerns in Canada's schools. Research indicates that these peer relationship problems are commonplace. The Canadian Public Health Association (CPHA), (2004) conducted its Safe School Study in 2003 and 2004 with 5,561 individuals across the country. This study was in response to the National Crime Prevention Strategy funding to the Canadian Public Health Association for this research project. The project comprised of a safe school study and the development of an assessment toolkit for bullying, harassment and peer relations at school. Surveys were developed to provide a standard way to measure the prevalence of bullying, sexual harassment and racial discrimination. The surveys assessed who is involved, where and when these problems took place. The student surveys were adapted from the Safe School Survey developed by the West Vancouver School District in the province of British Columbia. Schools were recruited from across Canada to test the surveys. Data were collected in the Fall 2003 from 2,806 individuals and in the Spring 2004 from 2,755 respondents. The survey measured perceptions of school safety and hot spots for bullying and harassment. Quantitative data were supplemented with a series of audiotaped qualitative interviews with school administrators, teachers and students. Approximately 45% of students in the study experienced bully-victim problems, sexual harassment or racial discrimination at least once during the four-week period, including roughly 10% who were involved as perpetrators and/or victims on a weekly basis. Approximately 40% of students were not directly involved in these peer relationship problems, yet were affected because they saw or heard these incidents. In other words, only 15% of the students in this study reported that they were not involved in any way in these incidents. Results from this study also found that most students did not intervene or get help for victims. When asked why, students reported that they did not want to get involved, were afraid or did not know what to do. Only 15% of those victimized during the four weeks said that they reported the incident to an adult at school. Very few parents of bullies reported having any knowledge of their child's harmful behaviour and just over half of the victims had a parent who knew about it. In general, parents had very little understanding of when and where harmful incidents were taking place at school.

Other studies about violence in schools suggest that school violence is seriously underreported. Smith, Bertrand, Arnold, and Hornick (1995) surveyed the level and nature of school crime with 962 junior and senior high school students in Calgary and found that the most common victimizations identified were having something stolen (55.6%), having something damaged (43.6%), being threatened (42.3%) or being slapped or kicked (37.1%). The validity and reliability of the survey used in this study was not reported. MacDonald's (1995) study of school violence and 231 junior high school students in Alberta found that students did not report most incidents of violence for a number of reasons. Students fear reprisal and peer retaliation, there is a belief that these behaviors are normal and there is a general lack of satisfaction with how victims of violence in schools are dealt with by school staff. This finding is similar to the finding by the Canadian Public Health Association's (2004) study that found that most students did not intervene or get help for victims. When asked why, students reported that they did not want to get involved, were afraid, or did not know what to do. MacDonald's (1995) survey also found that over half of the students in her study experienced physical forms of violence (bullying, fighting, punching, and hitting); one-fifth of male students had been threatened with a weapon while at school; over 50% considered bullying to be a "very big" or "big" problem; and 35% of students would never report victimization or witnessing school violence.

Craig and Pepler's (1997) research on school yard bullying found that victimization occurred regularly, or once every seven minutes. The majority of bullying episodes occurred within 120 feet of the school building. A significant finding of this research was that adults were found to intervene in only four percent of the school-yard bullying episodes. Charach, Pepler, and Ziegler's (1995) earlier study on peer and adult intervention found that peers and adults can intervene to stop bullying and decrease its likelihood. Charach et al. (1995) also found that 75% of teachers reported that they always intervene in bullying episodes on the playground. However, in another study, children reported that adults intervene in only a small proportion of bullying episodes (Pepler, Craig, Ziegler, & Charach, 1993). These findings suggest that the definitions of bullying and attitudes of teachers are important in reducing bullying in schools. The results of these studies suggest that, if the teachers' knowledge of bullying excludes the indirect forms of aggression such as name-calling, spreading rumors, intimidation, or deliberate social inclusion, teachers may intervene more consistently and frequently.

Violence manifests itself in numerous ways, and the research cited above found that bullying is prevalent in schools today. If left unchecked, bullying can lead to more serious forms of violence for victims. Repeated victimization has been associated with social anxiety, loneliness, depression, poor self-esteem, and unhappiness at school (Craig, 1998). Severe peer victimization has also been linked to depression in adulthood and increased rates of suicide (Olweus, 1993). Olweus' (1993) research on bullying in Sweden found that children who bully others report elevated levels of depression, unhappiness at school, and family conflict. Children involved in bullying were four times more likely to have criminal convictions by early adulthood. Bullying also affects peers who may witness the aggression and the resultant distress experienced by the victim. Bullying may act as a social contagion whereby children observing such actions later engage in bullying behavior themselves (Rahey & Craig, 2002). An essential aspect of school violence prevention is the identification and implementation of intervention and strategies to prevent or reduce bullying (Whitted, 2005). If bullying continues as a school-related problem, it could result in students' dislike of school, increased truancy or drop-out rates. Bullying can result in many students being in fear of being bullied and afraid of going to school. If the school climate influences negative peer interactions the situation needs to be addressed (Rahey & Craig, 2002). If bullying is allowed to continue with few consequences, it is likely to interfere not only with children's academic development, but also with their social and personal development.

Without a clear policy on bullying and strong leadership to ensure its implementation, children will learn that those who have the power have the right to use it aggressively. Craig and Pepler (1996) argued that monetary costs of chronic bullying and victimization are high. Children would become lifelong costs to society because they would become involved in multiple systems such as mental health, juvenile justice, social services, and special education.

Olweus (1993) found that school factors, such as teacher attitudes toward bullying, the amount of supervision, and school policies on violence, contributed to reducing bullying. Principals and staff can develop a school culture that will not tolerate aggressive acts toward others. Preventing bullying can be incorporated into a larger school effort that ensures equity among students by teaching specific skills, such as empathy, social skills, problem-solving, and conflict resolution. Safe school initiatives need to be meaningfully integrated into the general mission of the school to promote students' competence in academic knowledge, personal-social skills, physical wellness, and preparation for the world of work (Morrison, Furlong, D'Incu, & Morrison, 2004). Infusing interventions into ongoing school improvement efforts, allows educators to think about and create safe school environments for all students in their overall efforts.

Because peers are present in most bullying episodes, they have the potential to counteract bullying by intervening (Hawkins et.al., 2001). Children hesitate to intervene because they may be unsure of what to do, fear retaliation, and may worry about causing greater problems by responding in the wrong way. It follows, then, that we must provide children with appropriate strategies to intervene safely and effectively. School-based intervention programs need to encourage bystanders to intervene and support potential victims of bullying.

The studies cited above illustrate the need to shift from focusing on bullying as a single problem. Interventions that focus on schools as a system and attitudes in general, are needed to counter the acceptability of bullying behavior. Interventions need to include the school, the classroom, and individual levels (Rahey & Craig, 2002). Prevention programs that are ecological in design, or implemented school-wide, have been found to be successful in reducing bullying by 50% over three years (Olweus, 1991).

The challenge of providing a safe school includes clearly defining what a safe school is and providing a school environment that is free from bullying and harassment. The challenge becomes greater when students need to report to adults when victimized so teachers can effectively intervene.

Policy on Safe Schools

On March 21, 1996, the Alberta Minister of Education announced projects to help make Alberta schools safer and more secure. Four initiatives were announced: student-led conferences; development of curriculum materials for students, parents, and teachers to help them deal with student aggression; collaborative research by Alberta's three universities on the nature and extent of the problem in Alberta schools; and studies on policy and program implications (Alberta Education, 1998). This announcement was preceded by two forums on school violence. The proceedings from these resulted in a number of recommendations by education partners to improve student conduct and reduce violence in schools (Alberta Education, 1994).

In 1993 and 1994, the Minister of Education hosted two forums on school violence. Of the many recommendations made, those relevant to issues related to school governance included: conduct a review of the provincial legislation; ensure a positive role for parents; establish a student conduct and/or school violence policy to reduce variance among boards; and develop curriculum materials. In February 1996, the Minister of Education invited the education community and its partners to formally discuss and offer suggestions on how to best maintain safe, secure, and caring learning and teaching environments in Alberta schools. Proposed strategies were to take into account the option to change legislation if necessary to deal with issues of violence in schools (Alberta Hansard, 1996, February 20th). In March 1996, the Minister announced Alberta's Safe and Caring Schools Initiative, including four major interrelated projects:

1. Identify the nature and extent of violence in Alberta schools: collaborative research was conducted by the Universities of Alberta, Calgary, and Lethbridge to provide perspectives for understanding and implications of research on developing effective policies, practices, and programs. This research resulted in the publication of *Building Foundations for Safe and Caring Schools: Research on Disruptive Behavior and Violence* (Malicky, Shapiro, & Mazurek, 1999), which was distributed to all Alberta schools by the Department of Education.

2. The design and development of curriculum support materials: developed under contract with the Minister, the Alberta Teachers' Association developed *Towards A Safe and Caring Curriculum: ECS – Grade 6* (1999). This curriculum integrated violence prevention concepts and the teaching of pro-social skills into the provincial Programs of Study and encouraged school practices that model and reinforce socially responsible behaviors in students and staff.
3. The development of a resource manual for school staff: released by the Alberta Learning (1999), *Supporting Safe, Secure and Caring Schools in Alberta*, this provided school staff with information on legislation, policy development, violence prevention, crisis management, communications and support organizations and resources. This resource was to support school-based decision-making efforts of staff to provide a safe and caring school.
4. Review of the Alberta *School Act:* to be conducted by Alberta Education in consultation with provincial stakeholders, this determined how best to strengthen efforts by school boards to establish and maintain safe and caring school environments and outline more clearly the roles and responsibilities of school authorities. On May 3, 1999, the *School Amendment Act* was passed by the Government of Alberta. Introduced as Bill 20 in March 1999, this *Act* included, among other amendments, particular amendments proposed to the Minister of Education based on a review of Canadian legislation, discussions with provincial stakeholders,

> and research by the leaders in the Government of Alberta's Safe and Caring Schools Initiative. Although most of the amendments focused on suspensions and expulsion of students, Section 45(8) of the *Act* was specifically amended to include a responsibility of school boards to "ensure that each student enrolled in a school operated by the board is provided a safe and caring environment and reflects the importance of focusing on and maintaining pro-social behaviors of respectful, responsible behaviors" (Province of Alberta, 2004).This amendment highlighted the legal importance of providing a safe and caring environment by making it the duty of boards to ensure that students be secure from danger, harm, or loss and requiring attention and concern with meeting the needs of students and others.

The provincial policy on safe and caring schools and subsequent interrelated projects highlighted above provided the means for how schools can achieve the intents and purpose of the policy. These illuminate the normative expectations for what the education system should be focused on, namely, developing respectful, responsible behaviours in students. The projects developed to support the policy were be considered the most effective and efficient processes to achieve the policy goals. The projects provided school staffs the much needed support as well as a plan or framework to deal with the problem of school violence. These projects fit together into a coherent plan and were the instruments whereby the problem of ensuring school safety was to be addressed and the goals to be achieved.

Legal Precedents for Safe Schools

Provincial law imposes an obligation on teachers and principals to maintain order and discipline at school. Section 18(f) of the Province of Alberta's *School Act* (2004) states that a teacher, while providing instruction or supervision, must "maintain, under the direction of the principal, order and discipline among the students while they are in school, or on the school grounds and while they are attending or participating in activities sponsored or approved by the board." A principal of a school must "maintain order and discipline in the school and on the school grounds and during activities sponsored or approved by the board" (Section 20(f)). The responsibilities of each school board include ensuring "each student enrolled in a school operated by a board is provided with a safe and caring environment that fosters and maintains respectful responsible behaviors" (section 45(8)). Principals and school boards are certainly not powerless in dealing with violence by students and maintaining a safe learning environment for students and work environment for staff (Earle & Fitzgibbon, 1995). Administrators have a duty of care to protect all students, employees and visitors from physical and psychological harm (Roher, 1997). They also have a duty to maintain order and discipline and provide adequate supervision so that teaching and learning can occur. When administrators fail to protect those in school from harm, they may be found liable for any situation that may give rise to violence or an unsafe school environment (Roher, 1997).

A number of recent court cases relate to the issue of ensuring safe schools. Legal action against the Halton District School Board was successful when a brother and sister argued that the board failed to protect them from a group of bullies by not taking adequate steps to provide a safe learning environment (Roher, 2003). One of the more recent cases on school bullying and harassment is *Jubran v. North Vancouver School District (British Columbia Human Rights Commission*, 2002). In this case, discrimination was found in the ongoing homophobic harassment of a student. Azmi Jubran, a student in Grade 10, complained to the province's Human Rights Commission. The Commission found that the school board had discriminated against him on the basis of sexual orientation and had failed to protect him on those grounds. For five years, Jurban had been repeatedly taunted by students with homophobic epithets and physical assaults that included being spat on, kicked, and punched. Jubran had not identified himself as being homosexual. The British Columbia Human Rights Tribunal found that the school board had failed to provide an educational environment free from discrimination and that the progressive discipline strategy used by the school principal was not effective. This case clearly illustrates the responsibility of school boards to foster a discrimination-free school environment and have a positive obligation to address incidents of harassment. School boards have a duty to deliver educational programs in environments free of harassment. Codes of conduct and discipline procedures are necessary to meet this obligation (British Columbia Human Rights Commission, 2002).

In the case of *Regina v. D.W. and K.P.D* (2002), the Provincial Court of British Columbia convicted two students as a result of threats and acts of aggression.

On November 10, 2000, Dawn Marie Wesley, a 14-year old girl hanged herself as a result of threats and harassment by D.W. and K.P.D, two students attending the same school. In rendering the judgment, the judge wrote

> I was dismayed that people could gather around a bully, without recognizing that by doing so, they added to the power and intimidation of the bully…I was particularly dismayed that none of the bystanders had the moral strength or the courage to stand in front of Dawn Marie Wesley, to tell the bullies to stop, go away, leave her alone. (p. 3)

From a legal perspective, the concern arises as to the potential liability for educators in any incident of bullying or harassment involving students in a school environment (Hepburn & Roher, 1997).

In the decision of *Bonnah v. Ottawa-Carleton District School Board*, the Ontario Superior Court considered a school board's transfer of a student with special needs from an integrated placement in a regular grade 2 class to a special education class in another school. The change in placement by the school principal was a result of safety concerns stemming from continual disruptions in class, hitting and kicking, and growing physical aggression toward others, including the teacher. The court determined that safety took precedence over the procedures for the education of a student with special needs. This case raises a conflict between competing interests: special education placement and school safety (Trepanier & Nolan, 2003). A careful balancing act is needed in the legal context between the regular classroom as the first placement option considered by school boards in consultation with parents and the principals' responsibility to maintain order and discipline.

These cases illustrate the importance of school staffs preventing any situation that may result in an unsafe environment. Hepburn and Roher (2003) recommend a good risk-management program to assist school authorities in their statutory duties owed to students. The first part of any risk management program is to identify what the risks are and who is exposed to them. One major way to reduce risk associated with bullying is to implement policy and programs to increase school safety on a school-wide basis. It is important that all parties have a clear understanding of such policies and programs and work together to shape the school environment and commitment to respect, responsibility, and civility.

There must be order and discipline in the school environment so that the excesses of particular individuals do not interfere with the learning of the larger group (MacKay & Burt-Gerrans, 2002). There must also be respect for the rights of the individual student as a counterbalance to the promotion of order. The Supreme Court of Canada recognized this in *R. v M.R.M* (1998) when it stated that a safe and orderly environment is necessary to encourage learning.

Zuker (1995) argued that educators must foster a safe and orderly learning environment where all students accept personal responsibility for themselves and respect the needs, feelings, and backgrounds and rights of others. We need to focus on how far school and classroom practices promote and strengthen peaceful relations among students. Educators have a duty to address proactively the factors that have a negative effect on the quality of the learning environment. Teachers, by their words and conduct, must address impediments to the safe and positive learning environment and be ever diligent of anything that might interfere with this duty (MacKay, 2006).

The research on nature and extent of bullying in schools and decisions of recent court cases present an ominous warning to educators that aggressive behavior must be dealt with as early as possible (Roher, 2003). The Government of Alberta has policy and resources to promote safe and caring schools. Educators need to be proactive in initiating changes that will create and maintain a safe school environment. These include implementing policies, programs and procedures. From a pedagogical perspective, in order to create a positive safe school environment, it is essential that schools adopt practices that are both preventative and responsive. Careful planning and comprehensive strategies are necessary first steps. The objective is to establish a culture of respect in our schools, where each individual is valued and treated with dignity. A school with a sense of community emphasizes the transformation of social relationships so that caring and respect become valued and practiced by all staff and students. These measures are not only important in creating a positive school climate, but help to minimize our legal liability and potential negligence. In developing and implementing the inclusive and safe and caring policies, school administrators need to demonstrate due diligence and care in preventing any incident of bullying or harassment.

Even where school officials have reason to believe a student may threaten school safety, they are responsible to act in the student's best interests (Mollard, 1996). Case law has made it clear that educators must balance the rights of individual students with the need to maintain order and discipline in the schools (e.g., *R. v M.R.M*, 1998; *Jubran v. North Vancouver School District (British Columbia Human Rights Commission*, 2002). Just as students have the right to a safe school environment, school authorities have the right to suspend and expel students. These rights require a careful balancing act. Annulling the right to access an education programs when there is the duty to attend school has serious legal consequences for a school administrator (Smith & Foster, 1996). Suspensions and expulsions or criminal charges do not fully address the issues at the heart of bullying. Actively engaging students in discussions and drafting codes of conduct for the classroom, the playground, and other activities provides an opportunity for students to reflect on behaviors, develop relationships, and model respect. It also provides an opportunity for students to talk about care and concerns as values that are important in the community. This strategy has been identified as an excellent method to help students learn the reasons for limits to freedoms and the basis for rights and responsibilities (McKay & Burt-Gerrans, 2002).

Definition of Public Policy

Defining policy is difficult. There are many definitions of public policy. Torjman (2005) wrote that there is no easy answer to what policy is. There are also many different kinds of policy. Many policy statements are abstract and general. One kind of policy is concerned with legislation, programs and practice that govern a substantive issue. Another kind of policy focuses largely on administrative procedures. Fulcher (1989) suggested policy is a product or outcome. It can be written (e.g., laws, reports, regulations), spoken (e.g., media reports) or enacted (e.g., practice, pedagogy). Public policy is defined by Pal (2005) as "a course of action or inaction chosen by public authorities to address a given problem or interrelated set of problems" (p. 2). This definition refers to a course of action in a given area by those in authority to do so. Pal (2005) also defined policy as the "disciplined application of intellect to public problems" or as "a thinking game" (p. 14). Birkland (2005) defined public policy as "a statement by government of what it intends to do or not to do, such as a law, regulation, ruling or decision, or a combination of these" (p. 139).

Pal (2005) wrote that "not everyone is empowered to articulate policy" (p. 6). For those who are, they are making a policy statement. Policy usually includes statements that holds one person with formal authority over another person with less authority to do something he or she might not otherwise do without a policy statement or requirement (Elmore, 2000). It is clear in the literature that government is at the centre of making public policy (Cochran & Malone, 1995). However, policies are not just contained in laws or regulations. One a law or rule is made, policies continue to be made by people who implement them. These are the people who put policy into effect. This implies that people who implement policy are policy-makers too. Policy-makers need to develop policy that attends to the local circumstances that make implementing such policy possible.

Most definitions of public policy focus on the role or actions of government. Walker (2005) stated that in practice, public policy becomes whatever a government decides to do or not to do. Some policies are of national importance and others are of local significance. Some policies are public articulations of beliefs or visions. Some policies change over time to reflect current thinking and others endure because they articulate basic beliefs or evolving rights. Howlett and Ramesh (2003) defined public policy as a choice made by government to undertake come course of action. These authors are of the opinion that although the activities of non-government actors influence what government does and vice versa, the decisions or activities of such groups do not in themselves constitute public policy. "When we speak of public policy, we are referring to policies that deal with public problems, not organizational routines or structures" (Pal, 2005, p. 6) According definitions by Birkland (2005), Pal (2005), Howlett and Ramesh (2003), and Walker (2005), only government adopts, endorses, constitutes public policy. Therefore, when they defined public policy, they do so in terms of the actions of government. Fulcher (1989) studied the division between policy and implementation. She argues that the traditional top-down model of policy was false. She concluded that policy is made at all levels and policy takes different forms. What policy implementers do turns out to be what policy becomes. Fulcher's (1989) studies found that policy is made at the classroom level and implementation may be or may not be consistent with government policy or legislation. This suggests that teachers are policy-makers.

Other definitions of policy include different dimensions. Thomas and Loxley (2001) wrote that "policy is concerned with defining objectives and in some instances the means through which they are attained" (p. 97). There are many ways in which policy is constructed and interpreted. The design of educational policies deal with educational problems and what, if anything, should be done about the problems through collective action by school staffs (Manzer, 1994). One dimension of policy focuses on a problem that needs to be solved. Problems are viewed to be in the eye of the beholder (Dunn, 1988) or as problems that are unrealized values, needs or opportunities, which can be achieved only through public action. For example, if a person views the problem of youth crime as an economic problem, a solution may be to ensure greater access to goods and services. If a person views crime as illegal acts, a solution may be to strictly enforce criminal laws.

Public policy is seen by policy makers and the public as a means of dealing with problems or opportunities (Pal, 2005). In this sense, policy is the means to tackle issues of concern to the community. Policies communicate values of what government should do for its public, beliefs about what government can do for its public and which institutional practices should lead to desirable outcomes (Stein, 2004). According to Stein (2004) the process of policy development includes a governing body, motivated by interests groups, economic circumstances, or societal concerns, wants to affect a specific situation, behaviour or condition of its citizenry. In order to do so, it must name a problem in need of reform and put in place rules and regulations to ensure a desired solution. Problem definition is the central element of a policy statement (Pal, 2005). If there is no perceived problem or a problem seems insolvable, one would hardly expect a public policy to solve it.

Another definition of public policy is that there is a discrepancy between what is and what should be. Put another way by Pal (2005), policies are problems with opportunities for improvement that may be pursued through public action. If there was not a problem policy would not be needed. The key is discerning the gap between what the problem is and what should be the solution. This process includes making arguments and persuading others. If policy is defined as solving problems, policy design is about choosing the most appropriate instrument to deal with the policy problem. This implies that a key component of policy design is choosing the right tool or instrument.

Policy tools or instruments are the resources and techniques that government uses to achieve policy goals (Pal, 2005). Policy tools are levers of change (Honig, 2007). Policy tools are used by government to provide and deliver policy goals (Walker, 2005). Government can be selective in the types of tools used. A major policy tool is the use of regulations. Regulations seek uniform compliance to policy goals. In the education system, regulations are used to bring about conformity to education policies and to influence practice in the field (Walker, 2005). For example, the provincial *Standards for Special Education* (Alberta Education, 2004) describe the expectations for school boards and schools in the area of special education. The purpose of this Ministerial Order is to ensure compliance with statutory requirements. The choice of instruments can be limited by legal restrictions or practical constraints. In public policy, to use the right tool means to use the tool best suited to the task as well as be consistent with a morally acceptable response (Pal, 2005). One instrument is to provide information and communicate the reasons for a particular policy. Another instrument is public schools. How schools are organized and what is taught provide opportunities to achieve government's policy goals.

Policy is about action and provides a framework or guide to resolve an important problem. Policies are also mental constructs or ideas and implementation is the practice of the idea. Ideas guide practice but practice adds details that help us learn and improve (Pal, 1997).

Challenges of Public Policy

In the early 1980s, the design of public policy was typically in the form of laws and government mandates on what needed to be accomplished. For example, in the area of special education, the focus was on categorical and regulatory procedures (Honig, 2007). In 1984, Alberta's Minister of Education, then David King, reviewed the provincial *School Act* using a process of public consultation. This review considered the mandate of the school system, the rights, roles and responsibilities of individuals and groups with respect to education and the control of policy making, including the administration and management of education. A background paper was released (Alberta Education, 1985) and included information on the focus and process of the review. Guiding principles, respective roles and implications for the province, school boards, community, superintendents of schools, school principals and teachers were outlined. While legislation has evolved into an administrative statute which has the "system of education" as its focus, the focus of this review was on the education of children.

> While the legislation must provide for a system of education, the "system" must evolve from a need to meet a stated purpose of education and to recognize and respond to the individual needs of the students, the needs of the parents and the needs of the larger society within which we live. The system of education is not, and must not become, an end in itself. Flexibility, responsiveness, access and equity are key factors in directing education towards the needs of parents, students, the community and society. (p. 3)

Education has a strong public purpose (Alberta Education, 1985, p. 9). Its purpose is directed to both the needs of individual students and the needs of society as a whole. It is essential that all schools share a common purpose. As stated in the discussion paper

> While differences within schools may reflect certain program orientation which relate to student ability and parental choice, it is essential that different program orientations do not detract from the need for all schools in Alberta to continue to a cohesive, well-educated society, which recognizes the needs and abilities of individuals. (p. 9)

The role of the province in governing the education system is to ensure purposeful, quality educational opportunities which enable individuals to develop their diverse and unique abilities. The central focus of the education system has to be on student learning. While all students have particular needs, the educational system recognized the "special needs" of some students. "Special needs students can be found on a continuum from the severely multi-handicapped to the gifted, each with particular and different educational needs" (Alberta Education, 1985, p. 20). During the same year as this provincial review of legislation, the Government of Canada introduced the *Canadian Charter of Rights and Freedoms.* The concept of equal benefit before and under the law was entrenched into Alberta's law and provided equal access to educational opportunities for students with disabilities. To make it possible for these children to receive an education commensurate with their potential "requires a commitment from the province and school jurisdictions to provide adequate facilities, programs, resources and specialized teaching and training methods" (p. 20). To assist school boards to meet their responsibility for students with special needs, the province provided additional funding through special education grants. The role of students included the "responsibility to abide by the rules of the school and to respect the rights of others" (p. 31). To support this, the provincial goals of education for the provision of basic education included a shared responsibility for the moral and ethical values with local communities.

A challenge for schools is when government shifts the resolution of a policy to school boards who in turn shift it to schools, rather than the education system as a whole. It is the classroom teacher who becomes responsible for implementation of policy. The implication of this is that classroom teachers will find meeting this expectation difficult because of the nature and extent changes or support required for successful resolution of each policy. Inclusive and safe schools require a commitment by staff and need to acquire techniques for educating a wide range of students, including students with behaviour disorders (Dyson, 2000). Organizations do not act; people do (McLaughlin, 2007). Teachers play a pivotal role in the implementation of educational policy at the end of the policy continuum. This role is as important as the policy-makers at the other end of the continuum who formulate the policy. Public policy seldom pays attention to what teachers need to learn and do to be consistent with policy. Perhaps this is because policy is usually intended to convey information and intention to teachers (Cohen & Barnes, 1993). If it is society's problems that government seeks to address through public policies then it is important that those affected by the policy are included in the policy-making process (Howlett & Ramesh, 2003). For example, Cohen and Barnes (1993) argued that, if teachers are to support a policy, policy-makers need to consider the pedagogical functions and provide information on what activities are needed.

Another challenge of public policy is that they can be either ambitious or ambiguous in its design (McLaughlin, 2007). Ambitious policies generally seek sustained change in practice or culture. Ambiguous policies contain statements with little information for action or lack resources to support implementation. Policies that matter are the ones that get implemented and change practice or beliefs. A well designed policy that had good implementation is, by definition, a success (Pal, 2005). Successful public policy is a result of incremental improvements that are incorporated into existing routines and norms (McLaughlin, 2007). Incremental improvements in response to a policy require opportunities to regularly examine practice, consider alternatives, and make adjustments informed by experiences. This implies that some policies are more attainable than others depending the implementer's starting capacity, resources or expertise (Honig, 2007).

Policies with different goals or tools for change often converge on public schools. Schools need to manage multiple policies at any given time. This implies that the diversity of policy tools simultaneously at play means that school staffs have to juggle an arguably variety of strategies, logistics, outcomes in ways that significantly complicate implementation of any one of the policies (Honig, 2007). The challenge becomes one of meeting multiple demands without creating confusion and determining who ultimately decides what goals to prioritize. Educational policy is unlikely to result in school improvement if it does not focus and deliver a coherent message about respective purposes and practices needed for successful implementation (Elmore, 2000).

Inclusive Education and Safe Schools

All public schools in Alberta operate under the same policies, including those specific to a school board's responsibilities on the placement of students with special needs in regular classrooms and ensuring that each student is provided a safe and caring school environment. School boards have considerable discretion and flexibility in the implementation of these policies. Schools, in providing education services with government funding, must carry out government policy. Schools are the means through which government has chosen to express its policy objectives. Through the responsibility delegated to school boards by the government, a school must ensure that students are provided equal access to equitable educational opportunities and a safe school environment. In other words, public schools are agents of the government and have to take positive steps to accommodate the special education needs of students and prevent bullying and harassment.

As written, policies specific to educating students with special needs and ensuring safe and caring schools are implemented within individual schools and across school boards. Given the multiple policy directives for schools there is a crowded agenda for implementation. If a policy on inclusive education or school safety is to sit at the heart of other initiatives and planning processes, such a policy may become marginalized (Ainscow, 1991). Progress is then determined by the determination of key individuals at the school, or district level, and progress may be patchy. Ainscow (1991) argued that "while the existence of a clear policy statement is seen to be imperative, its mere existence offers no guarantee of change" (p. 198).

Principals and school boards have the power to fully include students with disabilities and to deal with students who seriously disrupt the learning and teaching environment. Alberta's *School Act* (2004) continues to impose clear and specific duties on teachers and principals to maintain order and discipline in the school. However, simply to suspend a student, wait 10 days, and allow the student back into the school, accomplishes little (Zuker, 1995). Simple placement of students with disabilities into regular classrooms does not guarantee students are accepted and valued as individuals. A significant challenge for schools is how to respond effectively to student differences and respect student diversity.

Common misunderstandings about school staffs' legal responsibilities have slowed policy implementation (Kluth, Villa, & Thousand, 2002). In some schools including students with special needs into regular classrooms has been approached by some schools as if it is a policy that teacher can choose to adopt or reject. This begs the question as to whether inclusive education is a policy that schools could dismiss if they so chose, even though the courts have clarified the intent of the law to ensure equal access and equal opportunities.

Creating inclusive, safe and caring schools presents a real challenge. Without a consensus on what constitutes an inclusive school or a safe school, the challenge is to create a definition that teachers can envision and achieve. Without clear procedures on how to translate policy into practice, the challenge is to determine what supports teachers really need to be successful. The goal of inclusive, safe and caring schools is the achievement of consistently better student outcomes for all students, while providing a satisfying and supportive work environment for staff (MacKay, 2006).

The provincial stakeholder reports and task forces highlighted earlier in this chapter illustrate the difference between government policy as designed and policy as implemented. One explanation for this difference could be the context with which the respective policy is implemented and the lack of capacity to support the intent and purpose of the policy. Another explanation could be that the policy itself could be weak in its design or details. Another explanation is that schools can choose the nature and extent of policy implementation, particularly with respect to inclusive education. The implication is that when policy is translated into concrete action, or within a local context, it can be extended, reshaped or rewritten (Thomas & Loxley, 2001).

Summary

Chapter Two provides a review of the literature on inclusive education, safe schools and public policy. Various provincial task force reports revealed a number of challenges in the implementation of inclusive education and improving student conduct or reducing violence in Alberta schools. One major challenge is clearly defining what inclusive education is, what a safe school is, and what public policy is. Clear definitions and subsequent policy statements provide essential tools for school-based practices and activities. Definitions are pivotal to the successful implementation of policy.

The research and related provincial reports were highlighted to illustrate the extent of the policy implementation and challenges in providing an inclusive education and safe and caring environment at the school level. Since the introduction of government's policy on the placement of students with special needs into regular classrooms in 1993, one would expect a fairly high level of compliance but this does not appear to be supported in the related provincial task forces and reports. This suggests that policy is important but it is insufficient by itself. The ultimate test of inclusive education is making appropriate accommodations for students with special needs and to ensure equal benefits from regular education. This makes inclusion meaningful from the student's point of view. The ultimate test of a safe and caring school is ensuring the physical, emotional and psychological safety of students. This includes student reporting of victimization and teacher intervening consistently. Policy goals provide a framework for action and also serve as a mental construct of what is important. Success of policy implementation depends on the clarity of policy goals and the starting capacity or knowledge and skills of school staffs.

The information provided in this chapter serves as a basis for the purpose and subsequent design of this study. It followed the reasons for the significance of this study presented in Chapter one. The design of this study is explained in Chapter Three.

Chapter 3

RESEARCH DESIGN AND METHODOLOGY

Introduction

This chapter provides details on how this study was designed and how the research problem was studied. Case study criteria and selection are provided. Procedures for data collection and the process for data analysis are also explained. The purpose of this chapter is to explain how the confidence in this study's findings was achieved and to ensure the study's trustworthiness. In addition, by describing the process and procedures used to design the study, the limitations, delimitations, ethical considerations and researcher beliefs and bias are described.

Research Design

Development of a study's design must match the chosen methodology to respond to the research questions. The connecting policy factors between an inclusive school and a safe school were not clear in the literature, so the design of this research began with the need to identify these similarities. The primary purpose of this study was to identify the factors that connected the successful implementation of two policies. This necessitated a comparative case study approach. Using a case study as the basis of this qualitative research, this study examined exemplary cases, or schools with best practices, in order to develop a plausible theory of what made schools both inclusive and safe and caring.

Qualitative research produces evidence based on the exploration of specific contexts and particular individuals (Brantlinger, Jimenez, Klinger, Pugach, & Richardson, 2005). This type of research has been used to study the experiences of participants and responses to student diversity that exists in public schools. Qualitative research typically occurs in stages, moving from initial descriptive research to research that examines the process that might affect wide-scale adoption and use of a practice (Odom, et.al., 2005). Qualitative research has also been used to identify best practices. Four schools, as cases, were studied. Two schools were examined to observe what staffs in local schools said and did that resulted in their success in fully including students with special educational needs in regular classrooms. Two other schools were examined to observed what staffs said and did that resulted in their success in providing a safe and caring school for all students. The schools were then compared with each other. Subsequent analysis of the findings of the cases studied resulted in the building of a theory to explain what was discovered.

Case Study Criteria and Selection

A case study is an in-depth inquiry that uses multiple sources of evidence. It investigates a contemporary phenomenon in its real-life context (Johnson, 1994). A case study can be used for different purposes (Yin, 1989), the most important of which is to explain the links in interventions that are too complex to be uncovered through surveys or experimental strategies. Yin (1989) defined a case study as an "empirical inquiry that investigates an empirical phenomenon within its real life context when the boundaries between phenomenon and context are not clearly evident, in which multiple sources of evidence are used" (p. 23). The boundary between an inclusive school and a safe school are not entirely clear. The function of case study methodology was appropriate to this study as the central task was to probe for relevant connecting factors and their interrelationships.

Grenot-Scheyer, Fischer, and Staub. (2001) argued that case studies provide a format for organizing and presenting information about people and their circumstances. Schools as a case study can describe the real-life contexts in which the policy implementation occurs. Using schools case studies, I was able to look for and describe the actions and behaviours specific to each context and participant. The purpose of research by case study is not merely to portray a specific situation, but to do so in a way that illuminates general principles or themes that arise from the data.

Case studies are inherently naturalistic, conducted by means of gathering data from within a naturally existing social field in which the phenomena of interest are located (Lincoln and Guba, 1985). Considering the potentially infinite number of factors that might be related to inclusive and safe schools, a systematic approach to discovery of a more limited set of potentially important factors was possible using case studies. Sullivan and Thompson-Fullilove (2003) cautioned that a case study may not prove beyond all doubt that a certain relationship exists in a particular case, but it is probably the most trustworthy way to go about it. Lincoln and Guba (1985) clarified that case studies are excellent tools for pruning extraneous hypotheses and generating potentially viable ones. The function of case study methodology is appropriate to the nature of this study as the central task was to probe for factors and how they were connected in the implementation of the respective policy. Inclusive education and safe schools are difficult to understand due to the varying meanings, perspectives, and definitions (Grenot-Scheyer, Fisher, & Staub, 2001).

Given the comparative case study design for this research, schools were needed that were similar enough to study. In order to explore the beliefs and actions of school staff considered by others as providing quality programs, I needed access to these schools and staffs. The process of selecting schools began by nomination by school superintendents. I sent a letter of introduction to school superintendents (See Appendix A: Sample Correspondence) and also received nominations from consultants working in the respective fields. Thirteen schools were nominated in response to the introductory letter or my personal request to consultants. I arranged to tour each school nominated and therefore had an opportunity to meet each principal. I was able to observe first hand the programs and practices in place. Based on these tours, meetings and observations, I invited four school principals to participate in this study based on the following selection criteria:

1. School with three or more years experience with inclusive education or a safe and caring school initiative.
2. School staff had knowledge of the school's change process toward inclusion and safe and caring school practices.
3. Agreement to participate, be interviewed, and observed in school setting.
4. Administrative support to use school staff as a unit of study.
5. Referral from the school superintendent and/or professional colleague who are of the opinion that staffs are successful in meeting the diverse needs of all students.

Principals were provided a summary of the research study (see Appendix C: Summary of Research Study), the process to be used for interviews and the interview questions (see Appendix B: Interview Guide and Appendix D: Interview and Observation Schedule) to share with staff. Once principals sought permission from staff to volunteer to participate, the interview dates and times were scheduled in consultation with individual staff members. Each staff member interviewed consented to participate in this research study by reading and signing the consent form (see Appendix E: Consent to Participate in Research Study).

It was important to select cases carefully to ensure the data collected is theoretically relevant and maintain control over the conceptual development of theory (Glaser & Strauss, 1967). Theoretical sampling is the process of collecting enough data to generate theory. Theoretical sampling is defined as "the process of data collection for generating theory whereby the researcher jointly collects, codes and analyzes data, decides what data to collect next, and where to find them in order to develop theory as it emerges" (Glaser, 1978, p. 36). The process of data collection is controlled by how the theory emerges. Conceptual development inherent in theoretical sampling is "the systematic deduction from the emerging theory of the theoretical possibilities and probabilities for elaborating the theory as to explanations and interpretations" (Glaser, 1978, p. 40). Concepts derived from the samples describe the full range of behaviours that occurred in each case and also account for variations in behaviour.

Each school, as a case studied, was a theoretical sample. The four schools selected as case were studied during the 2004 and 2005 school years. Each school was visited four to seven days depending on what other activities were going on. Analysis of each school's supporting documents was conducted separately from the time in each school. At each school, the principal assisted in the arrangements for staff to participate in this study. Arrangements included discussing this study at staff meetings, e-mailing or developing interview schedules, sending reminders and, in two of the four schools, providing a substitute teacher for the teachers to be released from the classroom to be interviewed. In the other two schools, the overall number of staff interviewed was small enough for all staff to be individually interviewed during the lunch hour, during scheduled preparation times and after school. Between interviews, I was able to spend time observing staff working with students in the classroom. The amount of time needed for 36 interviews and classroom observations in four schools enhanced my ability to collect enough data to saturate it which helped to collect sufficient data for analysis.

My aim was to gather enough information to be able to generate explanations of the factors generated in each school under study. It was important to gather information as consistently as possible from one case to another. Notes on observations, interviews, and document analysis formed the basis for each case studied. Such thick description was needed for data analysis, to search for meanings of each experience, to determine relationships between concepts derived from the data, and to provide as much explanatory power as possible. In the following section the data collection procedures are described in relation to how each case was studied.

Data Collection

This study, although small-scale in nature, was also designed to increase awareness and understanding of a qualitative research process in addition to answering the research questions. Prior to using the Interview Guide (Appendix B), I piloted the interview questions with two teachers from an elementary school where I had worked as a school administrator. As a result of piloting the interview questions, I was able to accurately gauge the amount of time needed for individual interviews, ensure the tape recording device was operating, to determine if I could realistically gather sufficient all the data presented and whether the questions were understandable to each teacher. Piloting the questions helped to ensure that the questions were appropriate, that the time demands placed on staff was acceptable and to ensure I was able to document responses to each of the research questions. Each participant was able to understand each question and provide his or her response in a timely manner.

Interviews

Interviews were used as the primary strategy for data collection and in conjunction with observations and relevant policy document analysis. The interviews used open-ended questions in a semi-structured format and provided for individual variations (Hoepfl, 1997). In-depth interviews were conducted with 36 individuals who volunteered to share their experiences and successes with inclusive education and a safe and caring environment. The interview questions are included in Appendix B: Interview Guide. A written summary of the research topic and rationale were provided to each person prior to each interview. A copy of the Interview Guide was also placed in front of each participant during the interview. Prior to beginning each interview, I provided a brief summary of the intent and purpose of this research project. Each interview was audio-taped then transcribed. Each printed transcript was reviewed by the person interviewed for its accuracy. The changes requested to the transcribed interviews were limited to grammatical correctness. Verification of each transcript served to clarify accuracy of responses provided by each participant. Approximately 70% of all the staff in four schools volunteered to be interviewed for the purpose of this study. 100% of the staff interviewed verified the accuracy of their responses to the interview questions.

Although the Interview Guide developed for the purpose of this study ensured that the same questions were asked with each person, there were no predetermined responses. It was important to obtain accurate, uninhibited responses from the respondents that were based on their personal experiences and beliefs. The semi-structured nature of interviews allowed interviewees to shift the agenda and contribute their additional responses to the questions asked. Each interview averaged one hour in length. I remained flexible during each interview in order to probe and further explore unclear answers. It was important not to structure the interviews too tightly and to allow for individual respondents to talk openly about their experiences. Over time, I developed skills to become comfortable in my approach during each interview, and asked subsequent questions as needed.

The Interview Guide made efficient use of time scheduled for each interview, assisted those being interviewed to know the questions ahead of time, made recording responses easier and, helped to answer the research questions. In keeping with the flexible nature of this qualitative research design, the Interview Guide was modified to focus attention on an area of particular importance (Hoepfl, 1997). For example, when I was interviewing staff at a school reputed to provide an inclusive environment, the school's police resource officer volunteered to be interviewed. After I explained the purpose of the study, he indicated that he knew little about inclusive education. I asked if he wished to focus on what makes a school safe and he willingly agreed. I was able to change the questions quickly to focus on safe and caring schools, and we continued with the interview as scheduled.

Observations

The object of the observation process was to gather data and enhance my understanding of responses from the interviews. Observations by themselves were not enough because of possible misinterpretation or lack of understanding of the needs of students. Interviews lent meaning to observations and permitted me as the researcher to verify, clarify, and alter what I thought had happened. Observations help to achieve a fuller understanding of an incident and explanations of the experiences shared by each participant.

As a researcher, it was important to gain access to the variables that are controlled by the people under study (Glaser & Strauss, 1967). To achieve this, I needed to desensitize my presence during my time in each school and classroom. This process included: touring the school, sharing information on the purpose of this study; obtaining permission and interviewing individual staff; being present in the staff rooms during breaks and lunchtimes. I also needed to identify my purpose to students when requested by them. When students asked "Who are you?" after I had sat in a classroom for an extended period of time, I responded that I was learning from his or her teacher. Therefore, the design and process inherent in conducting this study assisted to desensitize staff and reduce possible distortion of the natural contexts.

Staffs who were interviewed were also observed in their interactions with students. Not all staff interviewed was observed and observations of staff who did not volunteer to be interviewed were observed. The reason for not observing every one of the 36 staff members interviewed was due to the logistical constraints such as time available, the interview schedule, or the multitude of activities occurring at any given time. The reason for not observing staff who did not agree to be interviewed was to respect their decision and the ethical guidelines governing this study. Observations of participants were in the context of a natural setting, the school or classroom environment. I observed teachers teaching in classrooms that included students with special needs. I also observed two staff meetings, one case conference and attended one staff committee meeting.

Observations led to deeper understandings when combined with interviews because they provided increased knowledge of the context in which events occurred and enabled me to question further things that the participant themselves were not aware of or did not discuss during the interview (Patton, 1990). The Grade 5/6 teacher at Patricia Heights School referred to her experiences teaching a student with severe Cerebral Palsy and learning how to communicate using a program called Boardmaker. During my observations of this teacher in her classroom, I connected the experiences she shared with me to my observations of that student. This focused my observations on the process of how teacher augmented her instruction with the use of a picture exchange system to enable communication between her and the student and within a whole group learning process.

I become skilled in the process of monitoring both verbal and nonverbal cues and in interpreting ambiguous language. I observed a staff case conference with parents of a student in Grade 4 who has Down Syndrome. As an example, my observations included the following notes:

> The case conference was held in the library with the teacher, assistant and inclusion facilitator. My observations were through the clear full-length windows to the library. Although I could not hear what was being presented, I observed staff talking to the parents, the parents physically leaning in towards the staff with satisfied looks on their faces. The student was smiling at her parents with her eyes closed and while nodding "yes" as each staff member talked. The parents were observed to be responding to what was communicated by staff. The student alternated her eyes between the adults as they talked as if it there was an ongoing rally in a great tennis match. As the conference came to an end and the adults stood, the student hugged each of the adults and waved goodbye. I observed her leaving the library, walking in the hall and entering her classroom. She climbed into her desk and sat there perhaps reflecting on what she just heard between her parents and her teachers. The adults were walking slowly out of the library, laughing, taking time to say good bye. After a few minutes the student looked at the student next to her, as if presented as a cue, she looked into her desk and pulled out a similar scribbler. The teacher returned to the classroom. I talked to the teacher during the break, I inquired as to how the case conference went. The teacher replied that it went very well and the parents are happy. She also stated that these parents were initially hesitant about staff's recommendation to fully include their daughter and have come to realize that her daughter is making tremendous progress. This was something the parents had not experienced in the last school attended.

I tried as much as possible to minimize my presence in classrooms by sitting unobtrusively in the back, remaining quiet, and letting my eyes explore what was happening. I waited for natural breaks to talk to staff if needed in order to seek clarification of observed actions.

Data Analysis

Bogdan and Biklen (1982) explain qualitative data analysis as "working with the data, organizing it, breaking it into manageable units, synthesizing it, searching for patterns, discovering what is important and what is to be learned and deciding what I will tell others" (p. 145). It was important for me to seek illumination or an understanding so that extrapolation might be applied to similar situations in other schools. Qualitative researchers tend to use inductive analysis of data, meaning that the critical themes emerge from the data (Patton, 1990). Such analysis required some creativity because the challenge was to place the raw data from 36 interviews into logical, meaningful categories; analyze them holistically; and then find a way to connect the categories to each other. Grounded theory methodology was used to analyze the data gathered in this study.

Grounded Theory

Grounded theory is a research process. It is the systematic generation of theory from data collected in a substantive area (Glaser, 1978). It is also the study of abstract problems in social settings where events naturally occur (Glaser & Strauss, 1967). The underlying logic for grounded theory procedures was first presented by Glaser and Strauss in 1967. Glaser (1978; 1992) continued to refine this methodology by further explaining the procedures and techniques based on his experiences and studies. Grounded theory refers to theory that is constructed from a base of observations of the world as lived by a group of people. A grounded theorist studies people in the social world they live in. Each of the 36 interviews was tape-recorded, transcribed, and validated by each interviewee. Observations were documented to further understand the culture of the school and actions of the staff. Relevant policy documents were studied and these added to the data set collected presented from each case. My aim was to document the views and experiences as naturalistically as possible and in the setting in which they occurred.

I used grounded theory because it was the most congruent to analyzing the responses to the research questions. The process helped me to understand the meaning of the data. Grounded theory also provided the procedures that led to the development of theory that, to date, does not exist. Glaser and Strauss (1967), in their discovery of grounded theory, claimed that, if the theory was carefully developed and fitted the area that was studied, it provided insights for those who practice in the field. Strauss and Corbin (1990) added that grounded theory is "inductively derived from the study of the phenomenon it represents" (p. 23) and that the goals are to "discover relevant categories and the relationships among them; to put together categories in new, rather than standard ways" (p. 49). One of the requisite skills needed to use this methodology is to fully know the data, step back from it then abstractly conceptualize it. This requires theoretical and social sensitivity (Glaser, 1992). These sensitivities were enhanced by my thorough knowledge of the data, constantly comparing data, my continual review of the literature, my familiarity with the schools and my analytical abilities.

Glaser and Strauss' (1967) original conception of grounded theory methodology is framed in terms of a series of iterations, a process of constant comparison in which the researcher moves back and forth among the data and gradually advances from coding to conceptual categories and then to theory development. I began the iterative process by comparing responses to each of the interview questions. This process of analysis involved the examination and reexamination of the data to discover inherent categories. Categories that emerge from a first reading were refined based on their properties as more data emerged and as data were triangulated with relevant observation notes and policy documents. A category stands by itself as a conceptual element and a property is an element of the category (Glaser & Strauss, 1967). Both categories and properties are concepts indicated by data and vary in degree and conceptual abstraction. Similarities of and differences between the properties of each category led to the formulation of theoretical codes or concepts. A concept provided meaning. A code represents the conceptual relationship between the categories (Glaser, 1992).

The concepts were then analyzed in terms of their interrelationships and to form a hypothesis or generate theory. My ability to narrow down the connecting policy factors between an inclusive and safe school grew throughout the duration of the study. This helped to determine what concepts to look for, to find evidence of them, and to recognize the properties of each factor. Considering the potentially infinite number of factors that might be related to inclusive and safe schools, a systematic approach was needed to limit the core variable from all the potentially critical factors. Several levels of analysis were subsequently used within the constant comparative method of analysis. The process of constantly comparing concepts identified the most important connecting factors that connected inclusive schools with safe schools.

The goal of this research process is new theory, grounded in the data. The theory is inductively derived from the data. Such theory was discovered, developed, and verified through systematic data collection and analysis. The process relies on the power of being able to generate concepts in order to make sense of the data. To ground my theory meant that this research is based on the actual statements and concrete realities of people as they live through their experiences (Boyd, 1990). According to Stern (1980), there are two main uses for grounded theory, in investigations of uncharted waters or to gain a fresh perspective in familiar situations. This study investigated a new area that had not been explicitly studied before. This study also delved into new territory as the policy factors that connect inclusive with safe schools had yet to be studied or identified. When I studied the actions, beliefs, and experiences of school staffs that used inclusive education and safe and caring pedagogies, they represented their conceptions through their own explanations and my observations of them in action.

I was concerned with theory generation through the discovery of what the world appears to be for participants and through my analysis of those perceptions (Hutchinson, 1988). My aim was to understand how groups of school staff defined reality and communicated this. To do this I continued to identify themes and related them to one another into a conceptual scheme using the constant comparative method of data analysis. To generate actual theory, I generated conceptual categories, described their properties, and then discovered the interrelationships among them. Strauss and Corbin (1990) describe the general method for developing theory, which is the constant comparative method, as involving the examination and reexamination of the data to discover inherent themes. Themes emerged from the data, were refined as more data emerged and information emerged from the continual review of the literature. As the study progressed, I continually examined the data for patterns. I collected and examined the data until no new patterns emerged. The theory generated then, is the artful integration of data and is grounded in the study of the phenomena.

A well-constructed grounded theory meets four central criteria for judging the applicability of theory to a phenomenon: fit; understanding; generality; and control (Strauss & Corbin, 1990). The theory generated from the data is based on the responses to the interview questions, observations of school staffs and document analysis. It is faithful to the everyday realities of school environments as it was carefully induced from the data. The findings of this study should be understandable to other school staffs pursuing the same outcomes for students. The details of each case presented in the next chapter are described as fully as possible as this serves to provide the reader an image of what each school looked and felt like. The themes generated from the data are explained in terms that are easy for teachers to understand. Each theme is explained and examples from the data serve to illustrate meaning. The theory is further explained using quotes and notes to illustrate the core variable and its interrelationship to the supporting themes.

Trustworthiness

When judging qualitative work, Strauss and Corbin (1990) argued that the usual canons of good science require redefinition in order to fit the realities. Lincoln and Guba (1985) identified the criteria used to judge the quality of qualitative research and emphasized the importance of trustworthiness, or confidence in, the findings. The criteria to enhance the trustworthiness of qualitative research includes: credibility; transferability; dependability; and confirmability. The readers of this study need to know what actions I took as a researcher that would increase their trust in my research ability and their confidence in the findings. Several actions were taken to ensure the trustworthiness of the data collected and analysis.

Credibility of the data was enhanced by prolonged engagement in each school. This was needed to collect a large amount of data. This study was completed over a two year period. Interviews were captured on audio-taped and reviewed by each interviewee for accuracy. Policy documents were gathered for analysis. Observations that followed interviews and were documented immediately while in each school and classroom. The data were constantly compared within and between the data sets. The complete data set was analyzed three times on separate occasions and yielded the same concepts and core variable. The collection, coding and analysis of the data were done simultaneously until patterns emerged and were further supported using the related literature.

Transferability of findings is based on the provision of sufficient information that can then be used by the reader to determine whether the findings are applicable to new or other situations (Lincoln & Guba, 1985). The four schools in this study were selected based on specified criteria and were comparable in size and student demographics. I described each school using as many details as possible for the reader to visualize the school setting and the staff. Once data were analyzed and findings summarized in relation to the literature, I had an opportunity to present my research at a conference. Following the presentation, senior leaders in two different school districts requested the presentation to their school principals. This helped to confirm the transferability of the findings from these participants' perspectives.

Dependability is the ability to demonstrate the consistency of results of a research study. In qualitative research, this involved the use of an "inquiry audit" in which a reviewer could examine both the process and the product for consistency (Lincoln & Guba, 1985). I gathered as much evidence as possible from multiple sources. The evidence used in the analysis has been kept, including field notes, taped interviews, and handwritten notes from each interview, observations, policy document, and the literature reviewed. It was important to systematically organize the data collected for easy retrieval and analysis. The information collected for this study is stored electronically, or as a hardcopy, for easier retrieval. I proceeded like a reporter, noted everything as best I could. I also photocopied and manually highlighted relevant policy documents and research articles to ensure accurate interpretations of wording within the context the words appeared. Through the use of a research journal, I recorded thoughts on the research project which provided reminders and traced my thinking patterns. When sparked by an idea, I made a memo of it to capture my thinking at that time.

Confirmability refers to the degree to which the researcher demonstrates the neutrality of the interpretations. This involved having an audit trail consisting of records of all data, analysis procedures, and personal notes. I addressed possible bias and personal assumptions about the data. The interviews were tape recorded and transcribed immediately to capture the accuracy of the words. These typed transcripts were primarily used to capture the meaning and essence of what was said or meant in each case. The original transcripts of the data were shared with each person interviewed to provide that person the opportunity to verify, add or correct any of the responses prior to my analysis. Although every interviewee was asked to review and provide written feedback to each interview, the changes requested were focused on ensuring the responses were grammatically correct. When I followed up by phone to verify the accuracy of each taped interview transcript, each person acknowledged that the information was received and his or her responses were accurate. Member checks occurred following the observation debriefing opportunities. Finally, once the data were analyzed and the core variable identified, I reviewed the literature to test my theory. Not reading the literature prior the start of the data analysis addressed the concern of possible preconceived notions or ideas to pre-form any theory.

Limitations

Each case study is dependent on the nature of the phenomenon studied and the particular circumstances in which it occurs. I designed this study to gather data relative to two substantive areas. I focused on four schools that had a reputation for being successful in the respective policy under study. I interviewed 36 staff members who volunteered and examined his or her responses and perspectives individually and collectively. I collected policy documents, recorded interview data and obtained observation notes for analysis from each school and staff volunteer. Staff interviewed included teachers, school administrators, teaching assistants, and a school resource/police officer.

Data gathered from each case studied are a reflection of the skill and industry of me, the research instrument. I simultaneously needed to develop my analytic abilities and grasp the meanings of the experiences in addition to following the study as designed. Therefore, the full generalization of the research findings to all public school settings is limited by the case study approach and my developing skills in the art and science of the research process.

This study was also limited to:

1. Interviewing individual staff who volunteered for the purpose of this study. Staffs who did not volunteer, or students, are not represented in this study.

2. Interviewing individual staff using a tape-recorder and relying on my own written notes in order to capture exactly what was said and observed in the most cost-effective and efficient way possible.

3. Purposive sampling using four schools that have a reputation for their success in providing an inclusive or safe and caring school environment.

4. Pragmatic factors including access to school during the school day, ability to observe the activities in order to collect enough information, and not interrupt the staff member's work or school.

Delimitations

Due to the nature of the research questions and purpose of this study, data collection was delimited to four elementary schools to conduct a comparative case study. In addition, it was important to narrow the focus to:

1. Information on two public policies in order to determine the factors that connect the two phenomena – inclusive education and safe and caring school environments. Other issues were not considered unless directly related to answering the research questions (e.g., Alberta Initiative for School Improvement or use of technology).

2. Four schools in Alberta, two with a reputation of being successful with inclusive education and two in providing a safe and caring environment.

The schools needed to be comparable in terms of size and student demographics.

3. Purposeful selection of school staffs to capture their beliefs, experiences and actions. This increased the likelihood that each staff was knowledgeable, had experienced challenges and successes, and was willing to share this information on their own recognizance.

4. Schools in Alberta's public education system. Public policy and purpose of this study were drawn from the experiences in the Province of Alberta, Canada. The schools studied were governed by the same respective provincial policies and legal requirements of all schools in Alberta.

5. Financial costs, including driving distance, and ability to collect sufficient data at little or no expense.

Ethical Considerations

This research study carries ethical considerations as I collected and analyzed people's thoughts and observed a number of staff working in school settings with children, including children with special needs. Ethical considerations included protecting the dignity and well-being of each participant. These obligations were met by first obtaining ethical approval from the Department of Educational Policy Studies at the University of Alberta and, second, by obtaining approval from each participant using the specific process outlined in my Consent to Participate in Research Study (see Appendix E: Consent to Participate in Research Study).

I provided each person who volunteered to be interviewed a copy of a printed summary accompanied by an explanation of the research study, its purposes, benefits, methodology, data collection procedures, right to opt out, and assurance of anonymity and confidentiality (see Appendix B: Summary of Research Study). Each participant signed the Consent to Participate in Research Study form to indicate his or her understanding of the nature of his or her involvement. All interviews were transcribed and verified by the participant to ensure accuracy of the information collected. All information and observation notes were kept secured in unmarked boxes. The real names of each participant and schools are not contained in this report.

Ethical consideration was also provided during my time in each school. I was careful to arrange interview times that did not conflict with other activities or staff meetings. I arranged interview times that were convenient to staffs and conducted interviews in rooms that were not regularly used (e.g., the medical room). I attended staff or committee meetings on invitation either to provide information, answer questions, or to observe staff in action. I was careful not to disclose too much of my own professional knowledge or knowledge of the literature because I preferred staff to feel empowered to share their knowledge and experiences. I also tried hard to be as unobtrusive as I could when observing staff working with students. I stood at the back of the classroom, used natural breaks to talk to staff when needed, and remained quiet during instructional times.

Although confidentiality was respected as part of the chosen methodology, total anonymity was not possible. Schools were selected based on their reputation or successes and came recommended by the superintendent and other colleagues (e.g., education managers in the Department of Education and consultants in the field) who were familiar with each school. Once a school was chosen all staff were aware of my purpose before engaging the interview process and they were eager to help me in my efforts. Although all staffs were aware of my presence and purpose, not all staff members volunteered to be interviewed. Two staff members chose not to proceed with their scheduled interview due to extenuating circumstances. One staff member had to attend an urgent parent meeting and another had just been informed of a friend's death.

Researcher Beliefs and Bias

I am the primary instrument in this research study. A major concern is my closeness to the area under study and the potential to influence the quality of this study in either positive or negative ways. It is impossible to erase from my mind all my experiences or knowledge related to substantive areas under study. It is possible that my knowledge of and experience in the substantive areas under study may influence my analysis of the data. To ameliorate this issue, I need to acknowledge my beliefs and bias. This acknowledgement is to help the reader and other researchers to judge the possible influence on this study and its subsequent findings.

I graduated with a degree in education specializing in special education. I began teaching in 1986 in a classroom of 14 students with special needs. Part of teaching assignment was to support the inclusion of my students into regular classrooms. To accomplish this, I lobbied regular classroom teachers to "take my student" into one of their classes. I remained fully responsible for the progress of my students. If the student experienced success, the student remained in the class and if not, the student returned to my classroom for the duration of the semester. My next teaching assignment was to develop and implement a special education program in a junior high school with a focus on inclusion. Based on my former experiences and administrative support, I experienced greater success with teachers accepting students into regular classrooms, albeit there were some teachers who refused to accept some of my students. Success was a result of me consulting with teachers, spending more time in the regular classrooms, sharing expertise on behaviour management and knowing how to adapt assignments for some students.

My experiences teaching students with severe disabilities at high school level taught me that it was far more challenging to persuade regular classroom teachers to accept my students, even when additional teaching assistance and strategies were offered. High school students with severe disabilities also feared inclusion and preferred to stay in their "life-skills" classroom than be with students who were much different than them. Throughout my twenty years of teaching, I experienced many incidents where students with disabilities were ridiculed, taken advantage of and simply not wanted. I also experienced many celebrations when students with disabilities jumped with excitement about being included in an activity, regular classroom and field trip. Success also came from many teachers who shared with successes including students with disabilities in regular class activities. My most joyous moments included watching students succeed along side "normal" students when they believed they could not and when students achieved greater independence or skills as a result of being included with all other students. My expectations for the achievement of students with special needs were challenged when one of my students, Candace, passed the Grade 9 provincial achievement test in Language Arts. "See I told you I could do it" is her permanent echo in my professional mind.

As a school administrator I experienced what school leadership entails. The skills and knowledge that mattered were focused on instructional improvement and helping all staff support the learning needs of all students, including students who are not motivated to learn. The skills and knowledge that were practiced the most was the discipline of students and working with parents. As a school leader I realized the importance of relationships and power of collective action to solve common problems. In each of the above roles, I distinctly remember entering them with optimism and quickly becoming disillusioned due to my perceived lack of experience and formal training.

During my time with the department of education I was designated as the first provincial coordinator for the Minister of Education's Safe and Caring Schools Initiative. This initiative was new and without precedent in the province of Alberta. Developed based on stakeholder input and a review of the literature, this experience taught me the importance politics play in policy development. School safety was high on the public agenda and I found myself in a position to exert influence on policy. To have influence at that level of decision-making meant that I needed deeper understanding of the issues and to be knowledgeable enough about policy development to generate possible courses of action for public authorities.

Providing inclusive education was a condition of my teaching for over ten years. It was during my second teaching assignment in 1990 that lead me to graduate studies. I had experienced great frustration with the demands of parents for full inclusion of their child with cognitive and behaviour disabilities. Despite my support for and attempts to include this student in as many classes as possible, both regular classroom staff and students were frustrated by the ongoing antics of this student. To become more knowledgeable and trained in inclusive education, I chose graduate studies. I studied inclusive education and then obtained a Masters degree in educational leadership. I realized from my studies how little I knew. The more immersed I became into the literature, tried new instructional strategies and gained positive experiences, I began to believe that inclusive schools were also safe schools and vice versa. This perception needed to be validated, which became one of the underlying reasons for this study.

My experience as a teacher in different schools assisted in gaining access to schools and classrooms for the purpose of this study. I had not been in any of these schools prior to this study therefore I was removed from the context of each school enough to be an objective observer. Working within the education system for the past twenty years made it easier for me to relate to the language, jargon, terms and procedures heard and observed. Although a bit nervous entering each school for the purpose of this study, I immediately became comfortable because of the familiarity to my own experiences.

This study challenged me to clearly articulate what I believed in. From the onset of this study, I did not have a clear picture and only through my review of the literature did I become more confident in my beliefs. I believe in inclusion but I am not an advocate for the complete elimination of special education classrooms. I support public education and believe it can serve the needs of all students, albeit in different ways. I also believe that learning to respect others who are different goes a long way to making students feel safe at school and in their community. As a result of my professional and personal experiences, I am a proponent of inclusive education and safe and caring schools. I also believe that leadership matters at all levels. Together, the shared influence that comes from leadership at all levels in a school creates a mutually supportive learning environment for staff, students and parents. When everyone works together for the same reason, schools improve.

Summary

This chapter provided details on the design of the study and methodology used. The purpose of this chapter was to ensure the trustworthiness of the study. A case study was used and data were collected from interviews, observations, and policy documents. The selection criteria and process for a school's participation in this study were shared. This study's limitations, delimitations, ethical considerations and researcher's bias were also included. Grounded theory methodology, including a constant comparative method of data analysis, was used to connect the data obtained from the two inclusive schools and the two safe and caring schools selected for this study. The themes that emerged from the data collected are presented and analyzed in the following chapter.

Chapter 4

DATA ANALYSIS

Introduction

In this chapter I organize the data that were gathered in the four schools. The data are grouped into broad categories to illustrate the features of each school. The evidence is presented first from the two inclusive schools then the two safe and caring schools. A key feature of this chapter is the presentation of the data collected to uncover what staff said and did that made their schools more inclusive or safe and how they were able to sustain these practices. In order to present the similarities and differences among the four schools the data collected and are grouped according to each school's context, mission and values, pedagogical support, support systems, indicators of success and challenges. In particular, the organization of this chapter is used to illustrate the relationships between each school's espoused policy, the practices through which that policy was realized, and the understanding individual staff and groups of staff had.

Cases Studied

The cases studied were chosen from the public education system in Alberta, Canada. Two elementary schools were purposely selected based on their reputation with inclusive education for students with special needs. Two other elementary schools were purposely selected for their reputation for providing a safe and caring environment. All four schools fully included students with special needs into regular classrooms, and staff in three of the four schools were explicitly focused on providing a safe and caring school environment. Of the total number of interviewees, 19 were teachers, nine were teaching assistants, seven were school administrators or special education coordinators/facilitators, and one was a police officer.

The transcripts of the interviews provided the primary basis for data analysis. Evidence gathered in each school is presented separately as each case studied based on the aggregated interview responses. To assist in the data analysis each school's contextual description is used to profile each case and to assist in the comparison of all four schools. In particular, I provide evidence of how each school's mission was related to the practices and supports through which the particular policy was realized. This brief description is presented in Table 1. The presentation of the evidence will help the reader to understand the context, why each school moved to inclusive or safe and caring practices, the supports provided and indicators of success are provided. This analytic framework helps set the stage for the subsequent analysis of the findings in the following chapter.

Table 1. Brief Description of Participating Schools 2004 and 2005

School	**Brief Description**
Laurier Lake School	Rural elementary school providing regular programming for 220 children in early childhood programs to grade 4; 27% of students have special needs; focus was on safe and caring schools – effective behavior support. 58% (7 of 12) staff participated in this study, including administrator, counsellor, members of Behaviour Committee.
Maligne Lake School	Rural elementary school providing regular programming for 110 students in kindergarten to grade 6; 30% of students have special needs; focus was on inclusive programming. 60% (6 of 10) staff participated in this study, including administrator, inclusion facilitator, teachers and assistants.
Lake Beauvert School	Suburban elementary school providing regular programming to over 300 students from kindergarten to grade 6; 13% of students have special needs; focus was on safe and caring schools – effective behavior supports. 80% (12 of 15) staff participated in this study, including administrators, teachers and assistants.
Patricia Lake School	Rural elementary school providing regular programming to 250 students in kindergarten to grade 7; 28% of students have special needs; focus was on inclusive programming. 76% (22 of 29) staff participated in this study, including administrator, inclusion facilitator, teachers, assistants and a police officer.

Patricia Lake School

The Context

I begin the review of the cases studied with Patricia Lake School as it epitomized inclusive education. Staff was also dedicated in their efforts to provide a safe and caring learning environment since 1999. Staff had been trained to implement *Towards a Safe and Caring School: ECS – Grade 6* (Alberta Teachers Association, 2000), a safe and caring school curriculum. Patricia Lake School moved to a new school building in 2004. The school staff that moved to the new school was the same staff from the other school that was closed down due to its age. This new school is located in an agricultural and industry-based community of about 8,000 people and provides regular programming to 250 students in Kindergarten to Grade 7. Staff members include a principal, vice-principal, 12 teachers, 10 teaching assistants, one secretary, a librarian, a custodian, an inclusion facilitator, and a local police officer assigned to liaise with the school. All staff in this school volunteered to be part of this study.

About 28% of students had been identified with a special need and were provided a fully inclusive program. The student population included a number of students with severely disabling conditions who could have been placed in a segregated special education program in the local community school. Many parents of children with disabilities chose to send their child to this school because of its inclusive philosophy.

During this study, Patricia Lake School had been awarded a national inclusion award by a parent advocacy for full inclusion. Staff had been informed by the principal and parents were informed in the school newsletter. Staff members were appreciative of the acknowledgement yet were humbled about receiving an award. The school had been nominated by a parent of a student for demonstrating inclusive values and practices. Patricia Lake School had provided fully inclusive programming throughout this student's last four years in elementary school. In a parent letter supporting the award, the parent wrote

> Grade 3 meant a change in schools and administration. As we met with the principal to discuss our son's programming needs and our desire for inclusion, the principal's comment to us was, "If there is a better way, let's look at it."
>
> The parent went on to describe her experiences with this school district:
>
> During [my son's] Grade 2 year, it was recommended he and another with Down Syndrome receive their education in a segregated program. This was an extremely challenging time for our family... Grade 3 meant a change in schools...we met with the principal to discuss [our son's] programming needs and our desire for inclusion, the principal's comment was, "If there is a better way, let's look at it." Ever since that time the leadership was outstanding and supported [our son's] programming with ongoing professional development for staff and they sustained a long-term commitment to building an inclusive culture for all students...At his Grade 12 graduation, he was voted Prom King by his peers and was congratulated by many past teachers.
>
> (Parent Nomination Letter TR)

In a letter of support for inclusion into a college program, a student wrote a letter for the parents on behalf of the above student with disabilities. In his letter, he wrote,

> [Student's name] is a special needs student whom I have had the extreme pleasure of knowing since elementary school … [He] has taught me a significant amount of acceptance and value on unconditional friendship. He has been a very good friend of mine.

Each time I entered the school, I was reminder of the smell of newness of the building. This school had just been built two years ago. Brightness from the sunlight permeated the building through the many windows and sun lights in the roof. The secretary always expected me and explained the arrangements for the day. One the first day I met the principal and tour the school. My initial tour lasted two hours as we visited each classroom and had an opportunity to spend time with the principal in her office. During the initial tour the hallways were quiet during class time but came alive when the bell rang for recess or lunch break. The sounds of the students reverberated off the stone walls and high ceilings. Once the bell rang again these sounds quickly disappeared as the students entered back into their classrooms. No student was observed to be late or dawdling. Notes from my observation included the following

> I observed a teacher teaching a student a complex grade-level learner outcome taken from the Grade 5 mathematics curriculum. The student was asked to find the relative area of varying shapes and was provided three choices for the right answer. He provided a correct response and was asked to prove his response by answering the next question, which was similar. This would not have been extraordinary given the grade-level learner outcomes expected of this grade, except that the student was severely disabled and unable to voice his response. He used a pointer to pick his answer from a choice of three possible answers. The student got both responses correct with minimal assistance from the assistant sitting next to his wheelchair.

In subsequent visits to the school, I was able to spend time observing the actions of this teacher and the teaching assistant with the same student. The learning expectations for this student remained the same as for all students in the classroom. The student sat with other students, but with a specially constructed and enlarged desk top. The teacher provided assistance to this student in the same manner as all other students. She continually walked around the classroom, checking student work, asking questions to ensure understanding and assisted students to problem-solve. All students were provided equal attention and opportunity to have their progress monitored. The only notable difference for the student with the severely disabling condition was in how the instruction was differentiated. The student was provided visual pictures of the assigned math questions. The process to check for understanding was for the student to point to the correct response. The product was the correct response for three out of five questions. The content was learning to estimate area.

There were no tracking or ability groups and students were in age-appropriate groups. In this school, all students received the same instructional experiences.

Student progress was evaluated using a portfolio system. Portfolios were shared with all parents. In reviewing this student's portfolio, the teacher's commented on the student's progress and illustrated how the student demonstrated learning.

> I typed in the questions and provided a selection of answers which [the student] read himself. I held the cursor over the answer selections for a count of five and [the student] had to time her arm movement with the cursor. Please note that I did not read any of the questions or the answers to [the student]. Thanks for teaching me that you can read. You have done more this year than we have ever imagined. You have experienced many firsts here at [our school].

Mission and Values

The mission statement of Patricia Lake School was collaboratively developed by staff and parents and revisited in preparation to moving to the new school building.

> At [Patricia Lake] School our mission is to form people of love, care and compassion with a deep sense of hope who appreciate beauty and wonder, and who will serve the world with their gifts.
>
> (Patricia Lake Three-Year Education Plan)

The vision statement is

> At [Patricia Lake] School we will create a collaborative, inclusive community by differentiating curriculum, instruction, assessment to meet the needs of all students in regular classrooms where they belong.
>
> (Patricia Lake Three Year Education Plan)

The school's motto is "Soaring together … learning with hearts, hands and minds." This motto is artfully etched into the windows next to the school's main entrances and main offices. The statement of beliefs in the school's annual education plan mirrored the district's mission and belief statements in the *Board Policy Handbook*. Statements from the school's education plan give a flavor of what is distinctive about the inclusive philosophy of Patricia Lake School. The school's belief statements include:

> All students have the right to the education and skills they need to prepare them for work, and enhanced quality of life, and to be lifelong learners and responsible citizens in a democratic society.
>
> All students can learn and experience success.
>
> All students have the right of equitable access to a quality basic education program.
>
> All students are entitled to safe and caring learning environments.
>
> Our staff members believe that all of their students are capable of learning and experiencing success and therefore set challenging but reasonable expectations for student learning.
>
> Staff members willingly engage in professional and personal growth experiences to create effective teaching and learning.
>
> (Patricia Lake Three-Year Education Plan)

The principal play a significant role in the inclusive nature of this school. "We take this to a greater degree than others. I really support inclusion." Above all, the principal demonstrated commitment by ensuring all staff was of the same mindset. "Some people are not going to buy in and are going to leave because of that. Schools could be provided all the manpower, funding and supports and yet this still would not result in inclusive education if staff did not first believe in the philosophy." The principal's commitment manifested itself in many ways. First, the initiatives and strategies listed in the school's education plan were aligned to the above mission and belief statements. For example, one of the school's annual goals was "to foster a safe and caring school environment and to direct teaching practice toward meeting the needs of all students in inclusive classrooms." To achieve this, staff development was provided to increase teachers' capacity for differentiation and inclusion of all students in regular classrooms. Other staff development provided included differentiating of curriculum, instructional learning instructional strategies and classroom assessment to accommodate student readiness, learning styles, and interests. The principal arranged for the staff development to occur at the school site. Individual teachers were also supported to attend conferences related to inclusion. In addition, teachers were provided release time from their classrooms to work collaboratively and to share ideas and practices.

The principal provided staff support in the form of a teacher dedicated to facilitating inclusive practice. The role of the Inclusion Facilitator included providing ongoing staff support, assistance, and professional development; sharing resources and strategies; and coordinating case conferences and parent meetings. The principal modeled the school's core values and beliefs, particularly when teachers were challenged by certain student behaviors. In the words of the principal,

> We take [inclusive education] to a greater degree than others. I really support this. Our students are part of the community. It's their right to enjoy the same kind of learning environment that other kids do.

The principal ensured that all staff support and are supported in their efforts to provide an inclusive environment. The move to inclusive practices was the result of three veteran teachers who voiced concerns about students being pulled out of their classrooms. The principal discussed these concerns further with the rest of the staff. The principal then allocated funds and encouraged a seasoned, well-respected teacher to become an inclusion facilitator. It was important that there was a sense of ownership of the process and that people fitted into the school's philosophy. This was best reflected in the principal's comment "Some don't buy in and are going to leave because of it. I'm committed. I think it is the right thing to do." Staff interviewed supported the school's inclusive philosophy, and this was reflected in their responses to the question of what is the policy for inclusive education.

> Our policy at school is total inclusion. We accept any student and try to prepare an individual plan for them that will work and help them succeed as best they can.
>
> (Teacher – TR – NS)

> Our policy on inclusive education is to provide a teaching environment where all children are treated with respect and dignity and the diversity of their learning is appreciated. A plan is adapted for all children to learn in a safe and caring environment.
>
> (Teacher – TR – CL)

> I like our mission and vision of the school so I lead to that.
>
> (Teacher – TR - MK)

Move to Inclusive Education

Four years before moving to a fully inclusive model, a number of teachers had begun to question the "pull-out" model that required students to leave their regular classroom to spend time with another teacher learning skills in a different context. "It bothered me as some students were being pulled out too much and there was little transfer of learning back in the classroom." The Inclusion Facilitator went on to share her experience

> I kept forgetting to send the student out for resource help. One day, he forgot to remind me. He put his hand up to read a passage out loud. I was scared to call on him but I did. The students clapped after he read. After that I would not send him out anymore … Four years ago we started as a professional learning community … This year, we have team meetings, teachers are trained in differentiated instruction, we have coordinated supports for teachers … we have instructional practices that are part of an inclusive curriculum. When I was asked to become the Inclusion Facilitator, I initially said no because I did not have the training. My principal then asked me to read an article that included another school's success. Because I was one of the ones lobbying to keep students in class as opposed to pulling them out, I read more articles and then I took a summer training course on inclusive education … from there, I conducted a full day in-service at the beginning of the school year on inclusive education. It is the change process that is difficult and that needed to be established before moving on.

The role of the Inclusive Facilitator was to build staff capacity collaboratively to meet the needs of students with special needs and establish inclusive classrooms where all students can learn and belong. The Inclusive Facilitator viewed her role as a support to staff and as a troubleshooter when needed. It was a role that she cherished and worked hard to provide the technical or practical support for staff. One major support system that staff cited as important for successful inclusion was "someone you can go to if you have any concerns." From her perspective on the change process, the school principal shared her beliefs on the process of modeling the school's philosophy

> As we moved toward an inclusive school we had to be convinced that it was the right thing to do. It was a philosophical shift … If you think education is to contribute to a global community then it's a whole lot easier. You have to have a humanitarian perspective, love people, love teaching. Most teachers do … When everyone starts to understand, things start to go well, everyone benefits. We must all work together to make inclusion a success for our children.
>
> (Principal – TR - IW)

The school's mission "is everywhere in the school" stated a teacher. All staff had a part in the development of the school's mission. Time was taken to develop it and believe in it as staff prepared to move into the new building. Another teacher was emphatic in her statement, "We will include and accept everyone."

The principal was the most significant influence on maintaining inclusive practices. Her vision of how the school should respond to student diversity was focused and clearly articulated. "If you say you are committed to teaching, how does that sit with our values if we are kicking students out and not accepting them?" Staff was also influential in maintaining inclusive practices as reflected in their definitions of inclusion. "When you come into our school you should not be able to define special education or distinguish student differences."

The support of the principal focused on overcoming attitudes and increasing teachers' self- efficacy in order to "walk the talk" of the school's philosophy. The principal's modeling of the school's mission and vision statements and beliefs helped to shape staff attitudes and practices. When staff statements or recommendations did not fit the mission or values, the principal questioned their actions in the light of the mission or values as reflected in her statement, "I question people real well." The principal acknowledged that "Some don't buy in and are going to leave because of it." Staff interviewed indicated the importance of modeling inclusive practices. "It's a given that we have inclusion here … we accept it and grow with it," stated the grade five teacher.

Pedagogical Support

The school's commitment to inclusion was enhanced from the pedagogical support provided. "I have a student with Autism who is non-verbal. I have a specialist come in and help me." The support teachers valued the most was "teaching assistants and classroom resources." "Inclusion deserves the extra energy required of us" reported one teacher. In the staff efforts to re-conceptualize and respond to student diversity, the extra energy was based reflected in the reconstruction of pedagogy rather than reorganization of systems and structures. The goal in the school's education plan "to foster a safe and caring school environment and to direct teaching practice toward meeting the needs of all students in inclusive classrooms" also included actions to achieve this goal. Release time was provided once a month for teachers to work collaboratively. Staff was organized into "pods," which were intended for staff to meet regularly with the purpose to solve problems, share ideas and strategies, and to provide support for each other. In-house staff development was provided by the Inclusion Facilitator to teach staff how to differentiate instruction and link assessment to learning. The school improvement plan included a transition from differentiated instruction and use of that knowledge to develop skills in assessment for learning, which is seen as an enhancement of differentiated instruction.

School-selected strategies to support inclusive and safe and caring practices include teacher modeling of the core values and philosophy of respect for diversity and the unique needs of students. "No matter what the disability a child may have, they need to feel like they are part of the school and they belong." "Every student is included in every classroom, event, field trip and outings." This modeling also included teachers working together, sharing ideas and gathering input from everyone.

School-wide assemblies reinforce teaching social skills, concepts taught in each classroom using a provincial curriculum specific to promoting safe and caring schools. To enforce the school's code of conduct, students were recognized if they were observed by staff modeling good behavior. The weekly recognition of student behavior was in the form of STAR Students. STAR, as an acronym, stood for stop, think, and act right. Those who were STAR students of the week were called to the office over the public address system, were congratulated by the principal, and had their picture taken to be hung in the office. The names of the students were then published in the school's monthly newsletter for parents.

Observations of the role of the school's Inclusion Facilitator revealed the importance of this support for staff. The position of Inclusion Facilitator was part of a teaching assignment that included providing ongoing assistance and support to staff, staff development, coordinating services for students and arranging case conferences or parent meetings. Other assigned teaching duties included providing literacy intervention to young students and helping teachers implement the provincial safe and caring school curriculum. The Inclusion Facilitator had extensive and ongoing involvement in the development of a safe and caring school curriculum for the Alberta Teachers' Association. This curriculum development was supported by the Ministry of Education as part of the provincial initiative to promote safe schools. The teachers in this school had used this curriculum for the past five years. The Inclusion Facilitator said her position was rewarding yet professionally challenging. Her experiences as a curriculum developer challenged her to reflect on her inclusive practices. "If we say all students are to be included, then it is ALL students … Here I am writing this program and yet I am sending kids out of the community." This was her realization that an inclusive school environment was the foundation of a safe and caring school environment. In the first year of her new role, she found herself adapting the safe and caring school curriculum to include inclusive instructional practices and a greater focus on respect for individual differences. The process also included establishing a school-based professional learning community that included the principal. Additional funds were accessed from the provincial initiative for school improvement, which provided the means for release time over a three-year period. "Now every teacher in this school has regular time to meet and work together," said the Inclusion Facilitator.

In terms of pedagogical support for teachers of students with special needs, responsibilities were shared by all staff - the principal, Inclusion Facilitator, teachers, assistants and students. This had the advantage of encouraging everyone to take ownership of all students and enabled expertise to be shared and developed in house.

An example of living this philosophy included a student who presented challenging behaviors. In many ways, having a student with problem behaviors was a test for the staff's philosophy of inclusion. Their vision of equity required some pragmatic decisions and tested the validity of their belief systems.

> We have a student with severe behavior problems this year. At the beginning it was very hard to teach this student. We had to change the educational assistant and make some tough decisions as a staff. We did not want that student to go to a behavior program. We believed the best chance to be normal in society was to be included in school. The principal took a stand on this ... as long as the principal is here, we won't step back.
>
> (Inclusion Facilitator – TR – DS)

Additional Support Systems

Although pedagogical support was the basis for the school's success, additional supports were needed to maintain an inclusive school. The evidence of additional supports for inclusive practices at the school included much peer support and teaching assistants. Examples included: students pushing other students in wheelchairs out for recess without adult assistance; students with special needs being greeted by name by other students when entering their classroom or in the hallways; little adult proximity to students with special needs in the classrooms; teachers' use of cooperative grouping; use of peer support to explain instructions or directions; and having high expectations that resulted in all students writing the provincial achievement tests.

Because students with special needs were provided with additional funding, teaching assistants were employed to support teachers in addition to the Inclusion Facilitator. Teachers reported that "It is hard for a teacher to do this alone." "Support from an assistant is invaluable." "Assistants are your lifeline if you are going to make inclusion successful."

The most enduring aspect of the inclusive practices observed at Patricia Lake School was the fact that all staff referred to students using their first names and never referred to them as "coded" students, which was typical in many other schools visited in preparation for this study (i.e., students are assigned a provincial eligibility code as a result of formally identified special needs. Such codes are commonly used when referring to such students). This implied that all students were really treated equally, with caring and respect as they were very much part of the daily school and classroom activities.

Indicators of Success

In many ways, Patricia Lake School was an exemplary model of an inclusive school. The staff were consistent in their views on the importance of providing an inclusive environment and were able to articulate clearly the reasons why this was so. The school's vision, mission, and motto were the driving force behind teaching practices that included differentiating instruction and linking assessment to learning. Staff was provided with collaborative planning time, professional development, and additional supports in the classrooms. In the end, it was the staff that changed their response to student diversity. This ownership was a result of the local management of the change process. The staff's commitment to all students formed a large commitment to the notion of responding to student diversity and difference. Diversity and difference are viewed as enriching the quality of life in this school, and this was to be celebrated, not just responded to. This avowed commitment was reflected in the supports provided and practices observed. Responding to student diversity was a focus of the staff's organizational responses to removing barriers to learning.

This school's story is a success story. The school has maintained its commitment to all students over time, in the face of district budget difficulties in 2005 and in their efforts to support the inclusion of a student with a severe behavior disorder. The school's commitment is demonstrated in the high consensus among staff in their description of practices related to an inclusive school and their indicators of success. Teachers know they are successful when they "see children interacting with other children and using sign language," when "parents are happy," and when "students are being treated as equals and their needs are being met." One teacher's indicator of success sums up the school's overall success and ultimately shows that how children are grouped for instruction seems less important than how much they are provided with a sense of belonging and acceptance.

> You see changes in the students you are working with. It is nice to see normal students doing things you want them to, not because they have to. You watch students including everyone in a meaningful way.
> (Teacher – TR – MK)

Challenges

Patricia Lake School faced a number of challenges at the time of this study. One of the major challenges was dealing with the implications of next school year's budget. Staff cuts were predicted. Teaching assistant positions were to be reduced and the amount of time allocated to the role of the Inclusion Facilitator was also to be reduced. The extent of these reductions was not fully known until the student enrolment count was finalized. Job security played heavily on the minds of the teaching assistants as many faced the possibility of not having a position in the new school year.

Another challenge was presented by a student with severe behaviour disorders. This student's behaviour was seriously interrupting classroom and threatening the safety of other students. The student's parent was blaming the school and had refused to meet or cooperate with staff or the family support worker. A teaching assistant was provided to fully support this student. A behaviour support plan was developed with the assistance of the Inclusion Facilitator and school administration. A psychologist provided ongoing advice and strategies to staff to more effectively deal with the student's function of behaviour. The conference room in the office served as this student's temporary classroom. Efforts to re-integrate the student into his classroom were ongoing. However, after two months the assistant resigned. The next assistant also resigned and no applications were received in response to the job posting. Another assistant at the school agreed to switch assignments to work with this student. After four months, the student had failed to make progress with the supports provided. The administration was in the process of seeking an alternative placement for this student. More intensive support was needed than could be provided. The principal statement indicates exhaustion at being unable to provide the level of support needed for this student, "We took a long time to get to this point. We will include and accept everyone but there comes a point where making the school is unsafe. I feel that is when we draw the line." The challenge presented to staff by this student was a test case to the limits of the policy of inclusion.

Maligne Lake School

The Context

Maligne Lake School is nestled between rows of tall evergreen trees near a secondary highway. It is located in a rural farming area. All students travel by bus to the school from about a 25 km radius and remain at school for the entire day. This school was selected for its reputation for providing an inclusive program for students in Kindergarten to Grade 6. Over one hundred and twenty students attend this small school. Staff members include six teachers, one of whom was a part-time Special Education Coordinator, four teaching assistants, one secretary-librarian, a custodian and the principal.

Upon entering this small school I was realized this was a really old school house. The floors creaked as I entered the front doors. The walls were narrow and there were few windows. The secretary had been expecting me. She thanked the student who brought me to the office, took my coat, and offered a freshly baked muffin and a cup of coffee. While enjoying the coffee and fresh muffin, I read the staff bulletin board which featured the school's vision, principles, and goals. These had been recently developed and posted for staff to see. Included among many other notices on this board was the "Collaborative Planning" schedule for teachers. This schedule reflected the regular weekly planning time for each teacher, grade-level meetings with the special education coordinator and common planning time for subject specific disciplines. It had been placed on the bulletin board in the staff room for staff because of the frequent use of the schedule.

I asked the principal to explain the process for developing the school's mission and belief systems. She had completed courses in professional learning communities and was pleased to be able to bring this knowledge to staff. "All I did was ask the staff to review the mission statement and provide input to the process. We did this at staff meetings as well as individually." Feedback was received and the principal pulled the responses together to produce the final product, which was "pretty much the same vision as before." The concept of a professional learning community was the main strategy for staff to expand on their successes with inclusion and to develop the more recent focus on improving the writing skills of all students, including students with special education needs, which is part of the school district's new focus assessment for learning.

When I initially toured the school, it became evident that the school in addition to the inclusive programming, this school was also implementing an effective behavior support system. Three positively stated rules were repeatedly posted around the school: respect yourself, respect others, and respect property. Student posters illustrating the school rules covered the walls around each classroom. The principal explained that she had brought this system to staff as a strategy to improve student behavior because staff had voiced concerns. This system was most familiar to the principal as she had introduced it in her former school and it had resulted in increased staff and parent satisfaction and improved student behaviors.

Three priorities of Maligne Lake are reflected in the school's education plan. These include: increase student achievement; improve student motivation for success; and implement assessment for learning using the practices inherent in professional learning communities. Staff efforts are reflected in the results of the provincial achievement tests. Students achieved above-average results and staff had recently been requested to present how they had achieved such results at a number of local conferences.

Mission and Values

With input and discussions with school staff, the new principal continued to be committed to following the same vision previously established under the former administration:

> To provide each student a safe, supportive environment where the school community creates conditions for high student achievement.

The school motto of "Learning Together" also remained unchanged. The school's value statements were reviewed and in collaboration with staff. They included

> a school community with mutual respect, honesty, responsibility;
>
> an environment that is safe, inviting and supportive of student learning;
>
> curriculum and instruction that meet individual needs;
>
> students are equipped with skills that enable them to learn in meaningful contexts leading to lifelong learning;
>
> students are expected to maintain high behavior standards and academic excellence; and
>
> shared learning within a professional learning community.
>
> (Maligne Lake Three-Year Education Plan)

The vision and mission of the school were treated by staff as the equivalent of a policy. When asked about the policy, one teacher stated "Our school is inclusive." "It is what our District wants to see and it is what our school is doing."

"Everyone is working together, staff, administration, students, even parents, to ensure everyone is included."

The goals of Maligne Lake School Education plan included: reduce office referral for inappropriate behaviors using proactive intervention strategies; meet the diverse needs of all students through individual program plans, inclusive education, classroom assistance, reduced class sizes, and coordination of support services; develop and implement assessment tools that track student achievement; and develop and implement professional learning communities by empowering all members to solve problems and accomplish school and division goals through a collaborative learning model. Staff reported that due to the inclusive nature of their school, "We have to figure out what students need to be successful." In the words of the Inclusion Facilitator, "We are learning as we are doing."

Move to Inclusive Education

Thirty percent of students in this school were identified as having special educational needs. In the 2000 – 2001 school year, the school had been challenged by declining enrollment; insufficient funding to support all students, including students with special needs; and lack of resources as a small rural school. In response to these challenges and in consideration of the available options, staff chose to include all students in regular classrooms and redistribute human resources to support all classroom teachers. This decision increased the amount of special education funding provided to the school as students were kept at this school and not recommended for a segregated program in another part of the district. The additional special education funding received by the school was used to hire teaching assistants to support regular classroom teachers.

Two years later and in response to increased student misbehavior, the school's new principal had begun to work with staff to implement an effective behavior support system. During the time of this study staff had begun to shift its focus on school improvement specifically to assessment for learning as part of the provincial initiative for school improvement and in support of the school district's broad focus.

Interesting about Maligne Lake School was the staff's response to increasing enrollment not only to keep all the students with special needs, but simultaneously to become more knowledgeable and skilled in responding to student diversity. The staff needed to find a way of responding to student diversity and learning needs. Training in differentiated instruction was provided by the special education coordinator. "This is new for us" explained the Coordinator. Training and understanding of the school-wide positive behavior support system were provided by the principal. Information and strategies to reduce any form of bullying was provided by the school Counsellor. Additional support for teaching assistants was provided by classroom teachers and the special education coordinator. Coordination of other services, including speech and language therapy was provided to students in the classroom directly from the local health authority working in collaboration with the school district. To provide supports to the students, the teaching assistants moved with students during class changes and transition times.

Each of the training opportunities and design of the support systems used the concept of a professional learning community. Staff collaboration and decision-making were key strategies used to achieve the school's goals of providing an inclusive, safe, and caring school environment and to increase student achievement.

Pedagogical Support

The major pedagogical support provided for teachers was in the form of the special education coordinator. She was a veteran teacher with 26 years of experience, mostly in general education. She was provided time in her teaching assignment to coordinate services for students with special needs and provide in-class support directly to teachers. Regularly scheduled time was also provided to each teacher to meet with the special education coordinator. These initial meeting times were used to help teachers modify curriculum expectations, develop individualized program plans, differentiate learning goals, and share resources and teaching strategies. Now the same meeting times are used to help teachers develop knowledge and skills in assessment for learning, which was seen as a natural extension of differentiating instruction. Important for teachers was

> Time to sit down with staff members to discuss what works and what doesn't work … having collaborative planning times once a week to work on sharing curriculum ideas as well as helping each other out with materials.
>
> (Teacher – PS – L)

The role of the special education coordinator was held in high regard and this support system was regarded as essential for helping teachers adjust to teaching a much more diverse student body. "We have our Coordinator, she is our liaison with central office and she helps us" The principal shared that the "trust level is pretty good between administration and our teachers, they know they will get help and be supported."

The model of providing in class collegial support included the elements of a professional learning community. Despite the small number of staff and the isolated nature of the school community, staff met on a regular basis. "We have collaborative times once a week on a rotating basis." Each teacher assumed responsibility for a number of areas. "We work on curriculum as well as helping each other out with materials."

In addition to providing full inclusion, regular classroom teachers also developed the knowledge and skills in effective behaviour support system and assessment for learning. The special education coordinator was included in training in each of these areas. She provided teachers in-class support although the consultancy role prevailed. Consultation occurred through regular meetings scheduled between individual teachers and the Coordinator. This school was small enough that the needs of each student were known in advance. The end result can be best characterized by staff ownership of all students. Through the use of a professional learning community, in-class support provided by the special education coordinator, and flexible use of additional teaching assistants, staff felt supported in their efforts to provide an inclusive school community.

The model for making decisions was site-based. Site-based decision-making is promoted by the District as "those closest to the situation and most affected by decisions are best positioned to resolve issues and be accountable for the outcomes" (Administrative Procedures Manual, pp. 100-105). It includes the whole community and is intended to produce the most effective and efficient means to serve students. The school principal played a key role in encouraging and supporting staff to help students learn. The responsibility to ensure that students learn was shared. With site-based decision-making, teachers were integrally involved in making decisions and contributing to the process of deciding how best to meet the needs of all students.

The climate of Maligne Lake School is one of collaboration and cooperation. Staff and parents have worked together to maintain a positive and inclusive learning environment. Everyone had a role to play and took this responsibility seriously.

Additional Support Systems

One goal of all staff was "to develop responsible, caring and respectful members of a just, peaceful and democratic society." An expectation of staff from the district perspective was "Staff is expected to model and reinforce socially responsible and respectful behaviors so that teaching and learning took place in a safe and caring environment" (Administrative Procedures Manual, p. 300-306). Staff at Maligne Lake School had expressed concerns about student misbehaviors with the new principal, who then proposed a particular behavior support system. The principal proposed this system because "it matched the needs of students and ability of staff to implement it with existing resources." The principal had also experienced success with this system in her previous school. Staff agreed to the proposed system and it has become part of their school culture. Throughout the school, three rules were posted as constant reminders of behaviors expected of all students in all settings by all adults. Students are consistently given praise and acknowledged when demonstrating any of the school rules. An indication of this behavior support system's success is reflected in the students' responses to the annual provincial survey. Only one year after implementation, a twenty-four percent increase was reported by students who responded that the school provides a safe environment. Ninety-four percent of the students reported that the school provided a safe school environment.

Teaching assistants were frequently mentioned as important supports. "We have more support in terms of teaching assistants within the school, within the classrooms and small group pull-out." "We have flexibility as a staff" With the assistance of additional adults in the classroom, one teacher stated "I now have more one-to-one time for my students who need it." Teachers' use of additional assistance meant that more materials could be adapted for students. For a unit on novel studies, teaching assistants helped the teacher by putting one novel onto a tape and working with students grouped according to reading levels.

Indicators of Success

Satisfaction rates of parents, teachers and students were the main indicators of this school's success. In 2004 – 2005, ninety-one percent of teachers, parents, and students were satisfied that their school provided a safe and caring environment; ninety-five percent of teachers and parents reported that students modeled the characteristics of active citizenship; and eighty-five percent of staff and parents reported that students with special needs received required services in a timely manner. These survey responses were viewed as an indicator of success by the staff and administration.

Teachers were provided time in the weekly timetable to collaborate with each other, plan, and share resources. Success of staff with implementing a safe and caring school was then transitioned into a different school-wide focus on assessment for learning. Once the satisfaction rates with providing a safe and caring environment increased, staff implemented an explicit focus on improving literacy skills in response to the achievement test results for language arts. At the time of this study, staff were in the process of collaboratively developing a school-wide writing rubric during their collaborative meeting times. This may not have been possible without the initial success of implementing an inclusive environment.

The principal's indicators of success were that staff was achieving the goals they had set for themselves and that students were achieving their individualized program plans. Parent satisfaction had risen and staff were eager to learn about assessment for learning.

Other indicators of success for staff included "children not being singled out from others," "children are happy," they have "a sense of belonging in their school," and

> Kids are learning. When they say I get it, or when they say I can do something, that could not be done a week ago.
>
> (Teacher – PS – D)

These indicators were a result of "having someone to assist teachers in programming for student differences," "everyone's working together," and being consistent, "we are all doing the same thing." These beliefs were reflected in statements grouped into staff attitudes toward students with special needs.

> Now I believe all students are able to learn. Some are just wired differently. We have to figure out what they need in order to be successful.
>
> (Teacher – PS – D)

Challenges

During the time of this study staff was experiencing the challenge of supporting a student who was gifted. "This is now our challenge," stated the principal. The staff was skilled at working with students who were below grade level because of the large number of these students. The Special Education Coordinator was in the process of seeking information on workshops or conferences in order to attend for the purpose of gathering information and strategies. District staff was being consulted for advice and resources. While these options were being pursued, the student completed assignments provided by the teacher in the grade level above the student. Although this was noted as a challenge by the principal, a sense of optimism prevailed that the staff could provide this student a more appropriate program.

Another challenge faced by staff was how to group the same-aged students in the new school year. Staff had come to the realization that there would a number of students identified with a special educational need in one regular classroom that placed these students into the majority. Conversations were focused on whether to resort to this class becoming a remedial class to provide the instruction the students needed the most. Staff felt compromised because such a decision compromised their philosophy of inclusion, yet the needs of the students were paramount. By the conclusion of my time in this school, staff had decided that philosophy prevailed and the students were continuing to follow the regular program of study with modifications.

Lake Beauvert School

The Context

Lake Beauvert School is located over 250 km from a large city. Almost 320 students from Kindergarten to Grade 6 were enrolled. Staff included a principal, assistant principal, fifteen teachers, and eight support staff. On my first visit, the principal greeted me at the door and assisted in settling me into one of the rooms by the office. He provided a tour of each classroom, and introduced me to each staff member. We spent half a day together. During the initial tour, the principal stopped to talk to students, referring to each one by name and often inquiring how they were doing and getting updates on events in the community. I accompanied the principal on supervision duty at recess, walking in the outside playing fields. The principal frequently stopped to hug or hear news from students. He introduced me to the students and informed each one that I was there because of the "good things" that happened at this school. During afternoon recess, a student approached me and politely requested my assistance to retrieve a ball that had gone over the fence onto the road. I had to use the front entrance of the school to get the ball and bring it back to the playground at the back of the school. The student was most grateful for my help. Later when I observed this student putting the ball back into the equipment room after recess, he smiled and waved to me.

During my subsequent time in this school, the principal had arranged for staff to be released from their classrooms to spend time with me. A substitute teacher was provided for this purpose. The scheduled was developed to support staff preference for interview times. Between these times spent with each staff member, I observed staff in their classrooms and students at recess times.

Around the school were numerous visual reminders of positive behavior expectations and recognition of students who were observed modeling positive behaviors. At the end of the school's main hallway was a large bulletin board, which was filled with a behavior matrix with the school's three behavior expectations on the left side of the board and the various settings of the school across the top. Included in each cell of this matrix were examples of what students were to know and do in terms of positive behaviors in each location of the school. For example, students showed "respect for others" in school assemblies by "keeping quiet" and "staying in your own space." Students showed "respect for property" by "putting equipment away" and "putting garbage in cans." On an adjacent bulletin board was a large bar chart, which featured the number of students who were "caught doing great" by staff. The bars for each month showed a steady increase in the overall numbers of students observed doing something good. In the stairwell that led to the large playground, a "helping hand" display had cut-out hand shapes with student names written on each. Many hands in the display indicated how many students and parents provided a helping hand throughout the school.

Mission and Values

Lake Beauvert School's vision statement was "Learning for all … Forever." The motto was "Be the best you can be and look for the best in others." Their mission statement was:

> In a challenging, creative and supporting environment, all will be encouraged to be cooperative, independent, responsible community members. We will strive to nurture personal values and individual successes.
>
> (Lake Beauvert Education Plan for 2002-2003)

This mission statement supported the adoption of a behavior management system that stressed the importance of clear and consistent behavior expectations and the importance of providing students with positive recognition when they did what was expected of them. When asked to define a safe and caring school, staff provided the following examples.

> Children are happy to come to school and feel both physically and emotionally safe. This is because they are cared for.
>
> (Teacher – JS – C)

> All staff, regardless of their role within the school (i.e., maintenance, janitorial, support staff or teachers) all work together to ensure the safety of our students.
>
> (Teaching Assistant – JS – P)

> A safe and caring school is an attitude where we look after each other, not just our own students but everyone on the playground and in the hallways.
>
> (Teacher – JS – C)

The principal had the authority delegated to him to support the district's requirement that schools adopt strategies to create safe and caring school environments according to district policy that read

> In order to provide a safe and caring school environment which is conducive to effective learning, the Board believes that students should demonstrate a respect for self, others and property, display a willingness to learn and complete a reasonable program of studies, and attend regularly. Further, the Board supports schools in their development and achievement of standards of conduct that will assist students in meeting these expectations.
>
> (Policies, Guidelines, Procedures Manual, Policy 3006, Student Conduct)

Move to a Safe and Caring School

This school was 40 years old and staff had been together for about 20 years. Since 2000 - 2001, the staff had been challenged by reduced enrollment and increased class sizes. The school had experienced a loss of over 25 students in the past school year. Change was needed to ensure that parents continued to support this local school and to prevent further staff reductions.

Four years prior to this study, student behavior has become a concern among staff and parents. Bullying was on the increase and respect for others was declining. Something had to be done. The principal received information about a new behavior management system or "effective behavior support system." The Ministry of Education had sent information to all schools and there was no cost to attend training sessions. All schools in the province were invited, and training opportunities were offered in various locations across the province. The principal and vice-principal made arrangements to attend this information meeting, which was held in a location that required a three-hour drive each way. The information received "made sense" to them as "it involved less work" and "focused on the positives as well as consistent consequences." The administrative team presented the information to staff at the next staff meeting. The system was adopted by staff as "something simple and cost-effective." The principal provided the subsequent training for staff to develop and implement this behavior system. Funds were provided by the school's council to support staff training in the Kids Helping Kids, a peer-mediated conflict resolution program. The financial support provided the by the school council was an indication of the community support for the staff's initiative to improve student behaviors. Staff formed a sub-committee that included administration, two parents, and a teacher. This core group attended the follow-up provincial training sessions and worked together to develop and implement the behavior support system to fit the school's context and available resources.

This school provided inclusive programming to over 300 students, including 13% of students with special education needs. Sending students with special needs to other schools "was never an option" for staff because of the distance. Therefore, students with special needs were "always included." The school district policy on inclusive education included a statement that:

> The Board believes that all children have the right to a quality education, an education that shall provide a sense of belonging and acceptance in the school community and which will lead to personal growth, development and success of the individual child.

(Policies, Guidelines, Procedures Manual, Policy 3033, Inclusive Education)

The principal said that the effective behavior support system respected what st[illegible]lready put into place. "We have integrated students with special needs into regular classes and worked on teaching all students about safe and caring schools." In modeling the values of a safe and caring school, a staff member commented on the importance of also modeling caring and acceptance of others, including her son with cerebral palsy.

> Being the mother of the most severely disabled student in the school, I think that adult modeling is important. I model this by showing that [my son] is not to be feared and he is loved. I ensure that all students have access to him and can ask me questions … I demonstrate how children with special needs can be included.

This comment was reflective of the board procedures that included

> All students shall be made fully participating members of a regular classroom with programs in place which best meets their educational needs within the classroom context.
>
> (Policies, Guidelines, Procedures Manual, Policy 3033, Procedure 1.2)

Pedagogical Support

Staff primarily focused their efforts on the implementation of Effective Behavior Supports (EBS) to address their concerns with student conduct and bullying. EBS was judged a good contextual fit with the school's mission and beliefs. Staff adopted this system and agreed on common behavior expectations that were taught to all students on the first day of the new school year.

> There are yellow cards, which kids want and blue cards which you don't want. A teacher will talk to the student and warn them that they will be blue-carded.
>
> (Teacher – JS - V)

> Through EBS you monitor what is happening in the school and you soon find out what the behavior issues are. For example, our entrance ways were crowded and we had to put extra boot racks in to accommodate extra students and reduced the pushing and shoving.
>
> (Teacher – JS – C)

Lake Beauvert School's focus on providing a safe and caring school environment was visible in the staff's daily interactions with students, bulletin board displays throughout the school and in school newsletters or education plans. Each staff member greeted students when they entered the school and classrooms, movement was monitored through the hallway when teachers "caught students being good" and verbally acknowledged them with a yellow "Gotcha" slip, which was used to win prizes from the Treasure Box. Throughout each classroom and hallway, posters provided visual reminders of behavior expectations. Students were observed helping each other, including a student in a wheelchair, get ready for recess. Students with disabilities were included in recess games, including hopscotch or four square. The principal greeted each student using first names and took time to talk to each student and often inquired about their participation in extracurricular sports in the community.

Students showed their generosity by helping each other; made the school's announcements without adult assistance; and acted as monitors for student assemblies, recess, and lunch times. Students were also responsible for putting equipment away. During the school assembly, students were "put in the spotlight" and sat on a stool when called to the front of the stage. The principal acknowledged a number of students and provided specific examples of why they were put into the spotlight and how they had provided a helping hand. Every student was tracked during the school year to ensure that as many as possible were put into the spotlight. At the end of the assembly, the students put the chairs away in a neat and orderly fashion. These student activities demonstrated the increased responsibilities of students as part of the safe and caring nature of this school.

Additional Support Systems

Additional support systems most frequently mentioned included the supportive teamwork and additional training for older students. The student program

Kids Helping Kids was put in place, and training of students and staff was provided with funds from the parent council. This conflict resolution program taught to students in grades five and six so that they could help younger students resolve conflicts before adult intervention became necessary. Older students also provided additional classroom assistance for other students during inclement weather. This typically included playing games with younger students, reading to them or completing homework.

Staff frequently indicated that the support of the school administration was of major importance. The principal's support of the program was important. This support was seen as critical to its continued focus throughout the school and with parents. The vice-principal commented

> As the role of a school administrator, I have to deal with students that have problems and I think I am getting better at developing relationships with the kids and talking to them in a calm manner. They understand the consequences of being in the office and that we are the last resort. (Vice-Principal – JS – R)

Team support for the program was evidenced by staff responses that reflected their involvement in decision-making and working together. "This is one of the biggest reasons we are successful with providing a safe and caring school environment. Everyone provides a team effort to support student behavior." The staff was involved in decision making and this resulted in way they developed ownership and bought into what is being done. "Fundamentally, we have made a lot of decisions. We all have to agree to a certain extent. We all take turns at monthly meetings being involved in reviewing behavioral issues and addressing them" commented one teacher.

Additional support services also included the involvement of community agencies and an after-school care program. Staff had support from a school psychologist, a family school liaison worker, and an after-school care program funded by the local Family and Childrens' Services agency.

Indicators of Success

Students were consistently given a blue card when they failed to demonstrate the expectations for behavior. Each time a student was given a blue card the nature and time of the infraction were recorded in a database. After the first couple of months, staff reviewed the school's office referral data, including the location and time of the infraction, the grade of the student, and the effectiveness of the consequence. Subsequent changes were made to the travel patterns of the grade 6 students. For example, the teachers changed classes for two subjects, not the students, and the grade 6 students were taught to be more responsible, such as "cleaning their footwear" instead of changing to indoor shoes after every recess. Other behavior "hot spots" were found as a result of staff regularly reviewing the behavior data collected. For example, students in grade 5 were instructed on bullying and fair play and used this knowledge to help younger students during recess and lunchtimes. These changes significantly reduced the number of behavior problems and increased the number of opportunities to acknowledge the students positively.

Other indictors of success were reflected in the number of positive comments by staff related to what their school felt like.

> This is a happy place. When a new student comes in, they feel welcomed. The happier every one is, the more kinder and caring it looks.
>
> (Teacher – JS – B)

> This school is a place where people (i.e, staff and students) treat each other kindly, respectfully, politely, they are caring and follow the rules.
>
> (Teacher – JS – D)

In 2004, the school principal retired, and the vice-principal moved into the position. This move sustained the staff momentum. The vice-principal was part of the school's behavior support system and was able to step into the position, ready to continue the school-wide focus. The vice-principal succeeded in allowing staff to carry and share the vision for student behavior. This system has been sustained over time because staff were involved in the decision-making process, parents were provided updates and information about the effectiveness of the system and ongoing training was provided to staff and students. The Vice-Principal explained this best as "Everyone has the same vision of what the behavior expectations look and feel like when you are part of this school environment … we have a protocol in place whether it is a positive or a negative behavior. Children know they are being watched for positive things."

Challenges

One of the biggest challenges experienced by Lake Beauvert School staff was the impact of the financial cuts following the teachers' strike. The previous school year included a thirteen week labour disruption that had resulted in staff cuts the following year. Parents had begun to explore and embrace other local education alternatives such as a new Francophone school and home schooling. "We need to work hard to overcome the negative repercussions of a year with such unrest," stated the principal. Reductions were made to programs such as music, resource room and counselling services. In the opinion of the principal, the strike and subsequent cuts continue to have a detrimental impact on student learning and enrolment. Staff addressed this challenge by working more closely with parents and the school council working more closely with members of the community.

Laurier Lake School

The Context

Laurier Lake School is located 30 minutes south of the provincial's capital city along a secondary highway. Situated in a town with a population over 2,000, this public elementary school served the town's children from 4 years of age to 10 years of age, or from Kindergarten to Grade 4. Nestled off a large gravel and dirt parking lot, the 75 year-old, white-painted brick schoolhouse welcomed 200 students with diverse learning needs and backgrounds, including 27% of students with special education needs. Laurier Lake School served about 160 families with diverse needs. Staff included a principal, vice principal/school Counsellor, 12 teachers and five assistants, a secretary and custodian. A librarian was shared with another local elementary school.

When I stepped into the entrance of this two story building, a student asked if I needed help finding the office and gave me directions. I arrived in the office just in time to hear my name announced over the intercom as a welcome to the day's guest. The school was abuzz with activity as students took off their winter clothes and entered their respective classrooms. As I observed staff greeting students and ensuring boots were put onto the racks, I saw colorful bulletin boards filled with student pictures showed behavior expectations. Staff interacted with excited students in a kind, firm, yet caring manner. The principal provided additional praise and recognition when he greeted each student by his or her first name and gave a thumbs-up to students who showed good behaviors. The principal's daily announcements included birthday wishes, student celebrations and a welcome to visitors or substitute teachers.

The students in this school were in constant motion, moving from activity to activity within the classroom or between classrooms under the direction of a teaching assistant. A variety of student groups were used for different purposes. Some students were pulled out for additional assistance in reading. Students with special needs were fully included in every classroom. An observer could not easily identify which students were identified with special needs.

Mission and Values

Two years prior to this study, or in 2002 – 2003 school year, the staff at Laurier Lake School revised its mission statement to read:

> To help students realize their maximum potential and to develop in them a desire for learning.
>
> (Laurier Lake School Annual Education Plan)

The vision, and supporting the mission statement, focuses on three expectations for students

Students will learn to achieve to the best of their ability;

Students will learn to be positive members of their community; and

> Students will develop a desire for lifelong learning.
> (Laurier Lake School Annual Education Plan)

Staff developed nine belief statements to support their commitment to student success, and examples included:

> All individuals can learn;
>
> Learning involves the development of the whole child;
>
> Learning is an active process;
>
> The school is one of the many important influences in the education of individuals;
>
> We need to be caring citizens of the earth, community and school.
> (Laurier Lake School Annual Education Plan)

The school's vision, mission, and priorities on were present on school made posters, bulletin boards, and in the newsletters. The main focus of staff, however, was teaching respect to students. Specifically, "respect for self, others and property in general." This focus was reflected by the principal in his expectations for staff members. "Staff is a key factor in supporting all students and not disregarding any concerns or questions so students know there is respect and they will get the help they need."

Staff felt strongly that bullying should not be tolerated in any school and felt they really needed to work on giving students strategies on what to do if they were being bullied or saw someone being bullied. "We have to show and model how to do this. We don't give just students math problems and tell them to figure it out. We need to teach them the skills to use appropriate behaviors" stated a member of the school's EBS Committee.

The staff had identified two main priorities to work on: student success and a safe and caring environment. These two priorities were aligned to and supported government priorities for education. The staff provided direct instruction to students on how to act as they should do, for example, how to be safe and show caring to others, how to walk in hallways without being disruptive, and how to join in a playground play group.

The staff was experienced with school-based learning teams to support students with special education needs and with the art of collaboration as a professional learning community. Funds received from the Alberta Initiative for School Improvement (AISI) were used to implement professional learning communities two years earlier. These funds were used to provide substitute teachers which allowed staff collaborative planning time in the weekly timetable between classroom teachers and the school's special education coordinator.

The school's administration team merged the school's goals with the school district goals and matched them to the provincial government's goals for education. The school's priorities received no targeted funding. These included school-based learning teams for students with special education needs and the effective behavior support system. The principal provided staff training and brought in district staff or other colleagues to help staff develop and implement the system.

The school's Guidance and Counselling Program was developed by a committee of staff and parents. Its goals were to provide an environment where students realized their "maximum potential," developed "a desire for life long learning," and demonstrated "attitudes and behaviors that allowed students to learn in a safe and caring environment."

Move to a Safe and Caring School

Three years prior to this study, Laurier Lake School was challenged by declining student enrollment; more students needing individualized programming and behavior support; large class sizes that could not provide emotional, social, and educational supports; fewer trained teacher assistants to assist with implementing individualized programs; transfer of fewer students in and outside of the school's boundary; and increased competition with local alternatives to public schooling (e.g., religious education and private schools). The principal realized that, to deal with these challenges, staff needed to make changes. The principal outlined the challenges to staff and asked for their suggestions. Staff committed themselves to making changes and agreed to work toward an increased enrollment and to maintain staffing levels.

One of the first decisions was to keep students with special education needs in the school rather than sending them to the district's designated special education program. This resulted in additional special education funding coming to the school instead of going to the special education school. The decision was to integrate students with special needs fully into age-appropriate peer groups and grade levels, and provide all teachers with the skills and knowledge to differentiate instruction. The support of teaching assistants was provided to teachers based on the collective needs of each student group. The result of this single decision was increased flexible use of additional support for teachers, increased teacher capacity to differentiate instruction, collaborative planning time and smaller class sizes.

Teachers were also challenged by student behaviors as increased supervision of students had not reduced behavior problems, especially on the playground. This was an issue because parents began to voice concerns and staff were spending a lot of time reacting to discipline. This was a concern for the principal as a goal of the school's plan was

> Staff will treat all students with unconditional respect and in turn will expect students to respect themselves, their peers, their teachers and all members of the school community.
> (Laurier Lake School Annual Education Plan)

Pedagogical Support

The staff was experienced with school-based learning teams to support students with special education needs and collaboration as a professional learning community. Funds received in 2003 from the Government's Alberta Initiative for School Improvement (AISI). These funds were targeted to develop professional learning communities. These funds were used to provide substitute teachers which allowed staff collaborative planning time in the weekly timetable between classroom teachers and the school's special education coordinator. The school's EBS team met during lunch and after school and as needed to review behavior data and develop weekly social-skills lessons. Staff focused on three school-wide rules or behavior expectations: respect others, respect ourselves, and respect property. For example, students were taught a weekly social skill. Skills were determined in response to office referral data. Priorities for social skills instruction were: find positive ways to use free time; hands off; problem-solving; know and follow playground rules; and be safe. These expectations were explicitly taught by each classroom teacher and students were reinforced when practicing the newly acquired social skill. The students who were observed modeling the new skills were recognized at the school's weekly assembly and in year-end prize draws.

In the initial implementation of the effective behavior support system, the school principal took a long-term view and "did not run full steam ahead" as he wished to be sure that it blended in and that teachers would not feel overwhelmed.

Additional Support Systems

Observations of additional support system at Laurier Lake School included time for staff to meet. Weekly committee meetings were held to review student behavior data and design the school-wide social skills instruction; weekly student assemblies were held; an anti-bullying play was planned then staged by grades 3 and 4 students at the school's assembly; and playground games were selected to support teaching of social skills.

The school's comprehensive guidance and counselling program provided additional support and monthly activities. The vice-principal, family-school wellness worker, and the guidance Counsellor met weekly to collaborate and discuss what services would best meet the needs of individual students and their families. Weekly group counselling sessions were organized for gender specific needs or to provide some students additional social skills instruction. In addition the Counsellor worked with all classes to teach organizational skills.

A major component of the guidance program was its focus on anti-bullying strategies. The school Counsellor's role was to develop effective interpersonal skills in students, such as getting along with others, communication skills and increasing responsibility, and respect and caring to support health interactions and character development.

The focus on anti-bullying strategies was aligned to the school district's efforts to promote school safety. Additional resources and staff training were available from the district office. The Counsellor also focused her efforts on decreasing relational aggression among girls. This was an area not commonly addressed in other anti-bullying initiatives and was becoming more apparent in the younger girls. The Counsellor organized small single-sex groups and included positive role models, self-esteem training and anti-bullying lessons. The lessons were shared with staff, family-school liaison workers and parents.

Each week, parents received a copy of the lesson of the week and were encouraged to "discuss the skill with their child and reinforce positive examples at home and at school." Specific strategies used by staff in class were also provided to parents. An example was "Give me 5," a strategy used to ensure children are paying attention. Students were taught to show "body ready, eyes looking, ears listening, mouth quiet and brain thinking." Students were provided visual reminders using a hand drawn on a piece of paper with the five ways of showing attention. This social skill was reinforced through the "KC Award," which was the kids of character award given at monthly assemblies.

Early in the morning, administration tried to complete administrative duties before teachers and students arrived. Teachers would go into the staff room for morning coffee and sharing home-baked goods. Parents were always present in the building, talking to staff, students, and each other. Laurier Lake School was the smallest school of the four cases studied, yet had as many activities as the others.

Indicators of Success

The best evidence of Laurier Lake's success in providing a safe and caring environment were the little things I observed. The school principal arrived early each morning and prepared the morning coffee for staff. When students entered the school they were individually greeted and welcomed. Students responded in kind and were eager to share any news before they had a chance to take their boots off. Parents were present in the school, throughout the school day, talking to staff and students while waiting patiently in the hallways. As staff made their way into or out of classrooms, they provided frequent and specific praise to students: "I like how you stood to the side to let [the other student] pass," "Thank you for standing quietly in line," and "I am so proud that you held the door open for a younger student."

The school's 2005 survey results reported to the community found that 90% of students and parents were satisfied that Laurier Lake School provided a safe and caring environment. "We worked hard to achieve this and we still have work to do" commented the principal. This result represented an 8% improvement in one year. Students cared for each other, learned respect for others, and were treated fairly. All students were reported to have received recognition for their academic or behavior achievements over the course of the school year. Staff, students, and parents indicated support for the clearly defined procedures followed to help the school strive to provide a safe and caring environment.

Ninety percent of parents of students with special needs were satisfied that their children were receiving services in a timely manner from the school Counsellor, family-school liaison worker, or special education consultants. Parents also reported that ninety-five percent of students with special needs were provided with additional academic, behavior, and emotional support services in a timely manner.

With these structures now in place to support an inclusive, safe, and caring school, staff began to shift their focus to improve literacy and numeracy skills and implement daily physical activities. This shift was in response to provincial initiatives. Staff was in the process of learning about assessment for learning and developing rubrics for writing and math across the curriculum and grades. They were proud of their efforts and accomplishments. A real indictor of success was reflected in one teacher's comment on success:

> The positive role modeling has decreased behavior management time which allows for more academic time… I really think this needs to be made mandatory as it really works so well.

Challenges

Other than the challenges presented by staff that precipitated their focus on providing a safer school environment, no additional challenges were observed by me or noted by staff. These staff-presented challenges included: declining student enrollment; an increasing number of students needing individualized programming and behavior support; and decreasing class sizes.

Case Study Summary

These four schools had a reputation for providing quality programs, doing the right thing in the right way and better than most schools. The schools provided evidence that educators can make a sustainable difference despite the challenges of sufficient resources or additional funding. Laurier Lake School was challenged by declining student enrollment; an increasing number of students needing individualized programming and behavior support; decreasing class sizes; training teacher assistants to assist with implementing individualized programs; responding to increased student diversity and competing with local alternatives to public schooling (e.g., religious education and private schools). Maligne Lake School was challenged by declining enrollment, insufficient funding to support all students, including students with special needs, and lack of resources as a small rural school. Lake Beauvert School was challenged by reduced enrollment, large class sizes, anger from a recent labor disruption with subsequent staff cuts, and poor student behaviors. Patricia Lake School was challenged by pending budget cuts and providing an inclusive program for a student with severe behaviour disorders.

These four schools had the same responsibilities expected of all elementary schools in Alberta. These responsibilities, in addition to increasing student achievement, included reducing class sizes, implementing a second language starting in grade 4, conducting daily physical activities, using technology, and implementing the new curriculum in social studies. Each school merged its individual school goals with the district and provincial goals, which were to provide: quality learning opportunities; excellence in learner achievement; lifelong learning, world of work, and citizenship; effective working relationships with partners; and a highly responsible and responsive jurisdiction.

Staffs in each school exhibited remarkable levels of caring, a laser-like focus on their mission and a dedication to collaborative decision-making. Another characteristic that all schools shared was that the move to an inclusive or safe school was understood as a process that required everyone to be "on board" with their support. More importantly the change process was not necessarily a re-organization of the school's structures, but of the processes by which staff continually reflected on their successes and reoriented themselves in a more coherent direction.

Each case demonstrated the importance of school-based decision-making and professional learning communities. Each staff shared the school's vision as, in most cases, the staff was involved in crafting the vision and agreeing on the values. Pedagogical supports were provided in the form of staff development and training to realize the common vision. Additional supports were also provided to enhance the efforts of staff, and these often included teaching assistants, supplementary student programs, administrative support, and/or community resources. It is important to note that a major factor contributing to the success of these four schools was the ability of the school principal to work with staff to realize the school's vision and beliefs. This speaks to the importance of leadership and the ability to dismantle barriers that prevent staff from responding to the needs of all students. There was heavy reliance on staff development in the local school setting and developing greater collaborative relationships among all staff. What was most noticeable was the ability of staff to articulate clearly the vision in each school during the interviews.

Summary

The presentation of these cases studies describes the context in which inclusion or safe schools policies were being implemented. My central research focus was on what school staff said or did that resulted in their success. Mission and values, pedagogical support, support systems and indicators of staff success were highlighted for each school studied. The contextual descriptions were provided to profile each school and were used to provide a framework for analysis. The data presented from the case studies served to set the stage to begin to explore themes inherent in the data. The themes are explored in the next chapter.

Chapter 5

ANALYSIS OF FINDINGS

Introduction

In this chapter an analysis of the findings, based on the data collected, is provided. The purpose of this chapter is to enhance the analysis and uncover the factors that connected the implementation of policies specific to inclusive and safe schools. The intent of this chapter is to compare the findings from two types of schools and to build a theory that explains what made a school inclusive and safe.

I conducted a case-by-case analysis to verify, systematically, the findings presented in all cases. This comparison helped to provide a more coherent pattern of understanding of the similarities between the schools. The data provided the evidence and the literature provided support to influence my interpretations of the findings. Each factor is presented and interpreted based on the subsequent levels of analysis. In each of the schools studied there were a number of similarities and differences. Teachers were aware of the challenges of providing an inclusive or safe and caring school. This awareness was evidenced in the staffs' articulation of their experiences. Teachers, administrators and support staffs worked collaboratively to meet the needs of all students. Each of the participants in this study had experience teaching students with special education needs and dealing with disruptive behaviors in students. There was little reliance on outside or external experts. Staffs developed what they did together, including the sharing of ideas, expertise and supports.

The differences were in the reasons why the schools implemented their respective practices. Student enrolment, behaviour and availability of additional funding were cited as some of these reasons. Teacher support, administrative action and site-based decision-making were found to be the source for maintaining each school's practices. The themes inherent in these similarities and differences are further explored in this chapter to explain what the schools staffs said and did that bridged policy to successful practice. It is the integration of these themes that forms the basis for building a theory.

Generating The Theory

Grounded theory was used to generate theory based on the data collected and analyzed. The goal was to generate a theory that accounted for the pattern of behaviour that was relevant in each of the four schools. I was free to discover this in every way possible. Simultaneous data collection and analysis is recommended for generating categories and building theories (Anfara, Brown, & Mangione, 2002). Every copy of the transcribed interviews were analyzed, in addition to observation notes and respective policy documents. These slices of data were studied and examined thoroughly.

I began by constantly comparing responses to each interview questions to generate categories or patterns of responses. By continually comparing the responses, or using the constant comparison method, more abstract categories and their related properties were generated from within categories and between categories. This process helps to identify clearer patterns with specific categories and related properties. Relationships between the categories began to emerge (Anfara et al., 2002; Glaser & Strauss, 1967). Bogden and Biklen (1982) found that, "certain words, phrases, patterns of behavior, subject's way of thinking and events repeat and stand out" (p. 166).

Data were analyzed in three stages: open coding, axial coding, then selective coding. The first stage began with open coding of the responses to the 36 interviews and my observations in four school environments. The basic defining rule for the constant comparative method is, while coding each response or statement, to compare each response with all other responses. To begin, all responses to each interview question were grouped together, irrespective of the nature of the individual's response. Individual responses to the definitions, practices, policies and successes of an inclusive or safe school were physically grouped together under the respective heading. To facilitate this process, a matrix was used. The interview questions were listed down the left side and responses by staff were recorded in the cells to the right side under two columns: an inclusive school; and a safe and caring school. The last column on the right side provided the opportunity to memo what was similar and different within each response. Memos consisted of words, phrases or concepts that had meaning within the context in which the responses were provided. Most memos at this stage consisted of words taken directly from the language of the data.

I examined the data carefully, reviewed the intent of each word or phrase and the meaning of each sentence within the context in which it was provided or obtained. Each key word or phrase that I deemed relevant was highlighted and conceptually labeled. I highlighted words, thoughts, or actions to code that were descriptive of the research question and captured the essence of each person's response. This process sensitized me to certain words or phrases like "we are role models" and "we have to work together," that later were compared as two separate phenomenon because I interpreted one to be a product and the other a process inherent in the practices. The end product of this stage of analysis was a list of labeled phenomena called concepts.

The concepts reflected meanings or described patterns among responses by school staff. In order to bring a conceptual order to these meanings and descriptions, codes were used. Each code represented a more abstract term for similar words or phrases. Each code anchored the data that generated the concept. Once all the data sets were coded, I had over 100 initial codes, each traceable to the exact text from which it was generated.

This process helped me to begin thinking about the data beyond the descriptive to a more abstract level. These descriptive codes captured information in the data such as an event, feeling or behaviour. The goal during this stage was to ensure all concepts were captured in order to develop descriptive categories and their properties, which formed a preliminary framework for the second stage of coding. Words, phrases or events that appeared similar became a category. Categories consisted of groups of similar concepts. The categories were to be gradually modified, refined, or deleted during subsequent stages of the analysis (Hoepfl, 1997).

This next stage involved a reexamination of the all the categories that I had openly identified to determine how they were linked, a process called axial coding (Strauss & Corbin, 1990). Strauss and Corbin (1990) define axial coding as clustering open codes around specific axes or points of intersection. Sets of codes were developed and labeled if they were similar or connected to a pattern. I did this by taking the discrete concepts identified during the open coding stage, and then comparing and combining them into more abstract or broader categories that were related.

Each time I reviewed and categorized the same data set, I acquired a greater understanding of the data. During this process of axial coding, I began to make deeper connections between the similarities of the two types of schools. This step took the categories beyond the description to an abstract level of meaning. In tracing each open code backward, I compared the codes to identify common features, then refined and clustered them into fewer categories. To facilitate this process, the categories and the broader concepts were grouped together according to the significance within the respective research question. These categories and their properties were important as they established the initial links between the data and the theory.

An inclusive, safe and caring school is conceptualized to be:

- a feeling: warm, caring, acceptance of, respect for, positiveness;
- a belief: focus, goals, common vision, school mission;
- an attitude: all students belong, belonging, equal treatment;
- a system: one class for all, consistency, service delivery;
- sameness: age-appropriate, included all, equality, community;
- student focused: basic needs, happy, open communication, trust, acceptance.

Practices of an inclusive safe and caring school were conceptualized to include:

- programs: effective behaviour support, social skills;
- services: assistance, staff development, expertise, support;

- role modeling; respect, leadership, expectations;
- vision: philosophy, mandate, beliefs, opinion;
- teamwork: communication, goal-oriented, time, consensus;
- environment: access, welcoming, atmosphere, comfort.

Values of an inclusive, safe and caring school were conceptualized as:

- collaboration: sharing, learning community, mentor, flexibility;
- ownership: empathy, self-reflection, confidence, pride, motivation;
- consistency: modeling, procedures, expectations.

Supports needed for an inclusive, safe and caring school were conceptualized to be:

- human: administration, facilitator, assistants, each other, specialists;
- team: colleagues, community, decision-making, communication, process;
- consistency: vision, beliefs, values, expectations, process.

Policies of an inclusive, safe and caring school were categorized as:

- written: district, statement, guideline, administrative, unknown;
- action: site-based, goal, flexible;
- beliefs: values, vision, expectation, agreement, philosophy;
- resources: class size, programs, funding, teamwork, training;
- finite: limits.

Indicators of success were conceptualized to include the following:

- tangible: quantitative, collaboration, reflexivity, mastery;
- abstract: happy factor, attitudes, feeling, respect, growth, belonging;
- formal: training, capacity, accountability, communication;
- informal: culture, sustainability, empowerment, commitment, motivation.

The above concepts and their respective categories were then analyzed to further explore meanings and recurrences. At this stage, the concepts were divorced from the respective research questions in order to further explore theoretical connections. This process resulted in a condensed abstract view of the seemingly disparate list of concepts. The initial list of concepts was further delimited to those that were theoretically related. What emerged was a set of actions and their consequences. This process of constantly comparing the theoretical concepts reduced the initial list to the following synthesized themes:

1. Collaboration: teamwork; relationships;
2. Motivation/Outcomes: extrinsic (i.e., student growth, happiness); intrinsic (i.e., parent and community feedback);
3. Role modeling: high expectations; teaching skills and values;
4. Support system: human help; specialized services; common practices, trust; resources;
5. Consistency: common beliefs; vision; consensus; monitoring/feedback;
6. Ownership: self-reflection; autonomy; skills and knowledge; understanding;
7. Beliefs: all students accepted; included; respectful; and achievement.

The third and final analytic stage is referred to as selective coding (Strauss & Corbin, 1998), during which I clustered the codes based on how well they related to each other. I constructed relational statements between the themes. This thematic analysis also helped me to derive a core theme embedded in all the conceptual categories. The connecting themes were identified as

- Commitment: decision-making, goal statements, school improvement, expectations;

- Common vision: consistency, consensus, school vision or goal, consistent practices;
- Collaboration: teamwork, relationships, shared knowledge, problem-solving;
- Capacity: knowledge, skills, pedagogical (adapting, differentiating instruction, effective behaviour support systems);
- Culture: shared values, trust, beliefs (equality, acceptance);
- Ownership: motivation, self-reflection, autonomy.

These themes were tested by examining the extent of their relevance to the interview data and the context with which responses were provided. This analytic process grounded the data because it allowed me to re-apply the themes to the complete data set and arrive at a theory of how school staffs provide inclusive and safe and caring school environments. It was during this re-review of the connection between the themes that I discovered the majority of the interview responses began with either "I" or "We" followed by an explanation of some sort. In constantly comparing individual responses specific to "I" or "we," I initially abstracted the broader theme of intrinsic and extrinsic motivation. Subsequent analysis resulted in these two being assimilated into the broader concept of "motivation," which was then further abstracted to become "ownership." The properties related to the core concept of ownership were found to be, among others, a result of increased capacity in knowledge and skills, being committed to the school's vision, collaboration with colleagues and commitment. The data confirmed the variable of "ownership" as I concluded that all staff interviewed possessed the pedagogical skills required, had communicated a sense of accomplishment and had made the choice to expend the level of effort needed to be successful. In short, all staff interviewed were motivated, individually and collectively. This was the most striking realization and it best described all that had been included in the data.

The Core Variable

From the process of constantly comparing the data and developing theoretical sensitivity to the themes that bridged policy to successful inclusion of students with special needs and ensured a safe and caring environment for all students, I concluded that the central or core variable was where

> *In schools that were successful in providing an inclusive, safe and caring environment, school staffs "own" the policy implementation process and organize themselves accordingly.*

This theory is influenced and sustained by what staff in these schools said and did individually and collectively. The theory emerged from a common vision or purpose and is reflected in consistency and collaborative practices which built professional capacity and resulted in a culture supported by staff behaviours and beliefs. This leads to a more positive learning environment for everybody. It was not a result of a provincial or district policy.

The core variable that connected an inclusive with a safe and caring school was *staff ownership of the process.* Ownership meant that the process belonged to staff, they claimed the process used as their own, or were seen to be responsible for the process. Staff possessed the knowledge and skills to realize their vision of what they wanted their respective schools to become, regardless of who initiated the process.

The properties of the core variable were tested against the supporting themes. Strauss and Corbin (1990) provided the specific structure to be as follows: a causal condition leads to the phenomenon which leads to the context, which leads to action strategies which then lead to consequences (p. 124 – 125). Following this structure validated the relationships among the themes. The causal conditions (school improvement, goal statements) lead to the phenomenon (common vision), which lead to the context (including all students, improving student behaviour), which lead to action strategies (collaboration, building capacity to different instruction and implement behaviour support system), which leads to consequences (shared values, acceptance, respect, motivation and confidence, and finally, ownership for the process). This theory was tested against the interview dataset, the responses provided within each context, and this verified the substantive theory. The core variable of ownership was best illustrated by the following response from an administrator: "We had the staff involved in the decision making. Teachers were an active and regular part of the process. In this way, they developed ownership and bought into what is needed to be accomplished for our students. Teachers needed to be heard and then we acted on that."

Levels of Data Analysis

Using a visual display modeled after Harry, Sturges, and Klinger (2005), the findings are presented in Table 2. This display represents the inductive nature of the constant comparison method, moving through the analytic iterations from the ground up. This display also shows the analytic process as it illustrated the layering of the analysis.

Table 2: Levels of Data Analysis

Initial or Open Coding:

1. School environment: students feeling safe, ability to voice concerns, being together, helping/meeting needs, included/accepted, differentiation, support system, school-wide focus
2. Practices: proactive, a vision, common goals or values, staff consistency, high expectations, procedures (i.e., effective behavior support system), teaching practices (i.e.., differentiated instruction), staff training
3. Values: relationships, teamwork, student focused, self-reflectivity, understanding differences, role modeling, sharing, peer support, empathy, equality
4. Supports: human, moral, collegial, services, differentiated, shared beliefs, site-based
5. Policy: school-based practices, personal beliefs, flexibility, unknown provincially
6. Success: formal and informal feedback, stakeholder support, happy factor, student achievement, staff and student feelings, meeting expectations, intrinsic.

Categories and Properties:

1. Collaboration: teamwork, relationships, trust, reciprocity
2. Motivation/Outcomes: extrinsic (i.e., student growth, happiness), intrinsic (i.e., parent feedback)

3. Role modeling: high expectations, teaching values
4. Support system: human help, specialized services, common practices, trust, resources
5. Consistency: common beliefs, vision, consensus, monitoring/feedback
6. Ownership: self-reflection, autonomy, skills and knowledge, understanding
7. Beliefs: all students accepted, included, respectful and achieve.

Themes:

Common system + collaboration + consistency + capacity + culture = ownership

Themes and Interrelationships:

School staffs had a common vision (goal/beliefs, school's mission statement), made a commitment (were consistent, held same expectations); collaborated (developed relationships, shared knowledge, problem-solving); developed pedagogical capacity (adapting teaching, differentiating instruction); established a culture (shared values, beliefs, shared leadership); resulted in better support for students (respect and equal treatment).

Interrelating the explanations:

In schools that are successful in implementing an inclusive education and a safe and caring school environment, school staffs "owned" the policy implementation process and organized themselves accordingly. This theory is influenced and sustained by what staff in these schools said and did individually and collectively. The theory emerged from a common vision or purpose and is reflected in consistent and collaborative practices which built both professional capacity and school-based support systems. This led to a more positive learning environment for everybody. It was not a result of a provincial or district policy.

Theory:

Schools were successful in implementing policy specific to an inclusive or safe and caring environment when staff *own* their process and organize themselves accordingly.

Summary

In this chapter the grounded theory approach to analysis of the data was described. The theoretical framework was inductively generated from the progressive coding stages inherent in grounded theory methodology. This resulted in the identification of categories, concepts, interrelated themes and the core variable to generate the theory. The data were jointly coded and analyzed using the constant comparison method based on theoretical sensitivity to the data and the context the data were collected from. This process of conceptual analysis generated the core variable as staff ownership of the policy implementation process. This variable fit the data which explained the causal conditions, phenomenon, contexts, actions and consequences of staff's actions.

The next chapter provides for the further interpretation and discussion of these findings using the literature to further explain the factors identified in this chapter.

Chapter 6

INTERPRETATION OF FINDINGS

Introduction

This chapter interprets the findings that were analyzed from the data gathered in the four cases studied. These findings are interpreted in relation to the literature. This chapter is designed to further understanding of the factors that resulted in successfully bridging policy to practices. The focus of this chapter is to explore the factors that are connected to the core variable identified in the preceding chapter. Subsequent analysis of the interpretations of the findings is provided in the following chapter.

Summary of Cases and Questions

To facilitate the interpretations of this study's findings, two tables are used. Table 3 provides a summary of each case studied to review each school described in the previous chapter. This table highlights the context, mission or vision, policy focus, pedagogical support and additional support systems of each case studied. Table 4 provides a summary of responses to the respective research questions. This table highlights the themes discovered in response to how staff defined the schools, the practices and values that supported their efforts, the supports needed, the policies and, indicators of their success. Both tables are provided as a reminder of the original context for data analysis and subsequent interpretations.

Table 3. Summary of Each Case Studied

Case Study Focus:	**Laurier Lake School**	**Maligne Lake School**	**Lake Beauvert School**	**Patricia Lake School**
Context	Rural ECS-Grade 4	Rural K-Grade 6	Suburban K-Grade 6	Rural K-Grade 7
Intentional Focus: Mission or Vision	To help students realize their maximum potential and to develop in them a desire for learning.	To provide each student with a safe, supportive environment where the school community creates conditions for high student achievement.	Learning for All … Forever. In a challenging, creative and supportive environment, all will be encouraged to be cooperative, independent, responsible community members. We will strive to nurture personal values and individual successes.	We will create a collaborative, inclusive community by differentiating curriculum, instruction and assessment to meet the needs of all students in regular classrooms where they belong.
Policy Focus	Safe and Caring	Inclusive Education	Safe and Caring	Inclusive Education
Pedagogical Support	Effective Behavior Support System	Differentiated Instruction & Assessment for Learning	Effective Behavior Support System	Differentiated Instruction
Additional Support Systems	• Guidance Counsellor • Family-School Wellness Worker	• Special Education Coordinator	• School Council • Family-School Wellness Worker • Psychologist	• Inclusion Facilitator • Psychologist • Consultants

Table 4: Summary of Responses to Research Questions

Research Question	**Safe and Caring School**	**Inclusive School**	**Inclusive, Safe and Caring School**
Definition of a school that is:	A school where students feel safe and respectful of others	A school that includes and accepts all students	A school that accepts and respects all students
What does the school look like in practice?	Consistency and teamwork	High expectations and a support system	A school that consistently holds high expectations and has a built-in support system
How do you demonstrate values of:	Role model what is valued and being consistent	Understanding differences and working together	Staff work together to teach or model what is expected of students
What supports are needed?	Teamwork and a behaviour support system	Teacher assistance, differentiated instruction, teamwork	Staff work together and have training
What is the provincial, district &/or school policy?	Its an expectation	A school based approach	Is a result of school mission and/or personal belief
How do you know you are successful?	Students are happy and more respectful	All students included, happy and accepted	Student happiness and positive values are demonstrated

Connecting Factors

Common Vision

The single most frequent response from the four staff groups was a focus on all staff working together to achieve the school's mission, which included supporting every student. A safe feeling and students being included in all activities were often mentioned as the teachers' definition of an inclusive or safe and caring school. Responses that defined an inclusive or safe school included specific actions such as "A school that is positive, works together, shares ideas as well as welcoming new ideas or input from students, parents, administration and teachers, everyone is involved," or outcomes such as "A place where other kids matter, everyone is treated with dignity and respect. Kids feel free to express their concerns and know they will get help when they need it." The vision also included a sense of setting priorities to accomplish as reflected by one school principal, "[We] integrated [students with] special needs into regular class and then worked on teaching students about safe and caring schools."

In each school studied, staffs' consistent philosophy or mission created a sense of purpose for them. In other words, philosophy mattered. The beliefs and values created a sense of what was worth teaching and how it should be taught. Enabling staff to be more articulate about their views and philosophical judgments is a crucial first step in forming effective learning communities (Ferrero, 2005). A mission statement provides a statement of purpose (i.e., what is to be accomplished), the method of accomplishment (i.e., the activities), and the principles behind the purpose and method. A vision statement provides an image of what success looks like (Morrison, Furlong, D'Incau, & Morrison, 2004). Collins (2001) studied 11 companies that sustained "good to great" results and concluded that a single organizing idea, a basic principle, or concept unified everything that staff did. Transforming personal visions and individual thinking into a group vision is the challenge.

For change to begin, school staff must see the need to change and be motivated to take on the tasks that such change entails. In the schools in this study, this often took the form of a situation analysis. For example, student conduct became a concern or enrollment declined. Change continued in response to the intervention provided. When a school's mission is broadened to incorporate social skills in addition to the academic focus, assessment and monitoring of students' skills must be conducted in order to modify practices and procedures. For example, staff at Lake Beauvert School decided to increase their efforts to provide a safe and caring school environment. The key to their success was monitoring the student behavior and office referral data. This monitoring resulted in greater responsiveness to staff interventions. If discipline problems compete with the mission of the school, staff cannot achieve the mission or the broader educational goals which include academic excellence and citizenship (Sprague et al., 2002).

The schools studied did not make marginal changes to existing arrangements, but changed the basic organization to match their vision and beliefs. This supports the view held by Ainscow (1991) that inclusive schools are about asking fundamental questions about how the schools are organized, the processes used, and reasons why. Ainscow argued that inclusive schools do not arise as a result of school improvement efforts. He argued that research on school improvement is

> prone to formulating lists of characteristics that offer a deceptively simple technical solution to what are in essence complex social issues … School improvement is a highly complex process requiring sensitivity to the nuances of each school staff and local conditions. (p. 119)

Following Ainscow's argument, the literature on school improvement can be a useful starting point but can't be trusted fully. There is no single model. This is in line with other researchers who conclude that each school has its own idiosyncrasies and must develop its own way forward and drive change from the inside (Fullan, 1994).

The consistency of staff responses to their definition of an inclusive and safe school suggests that a core philosophy was widely communicated, understood and shared. This was an important factor found in Pfieffer and Sutton's (1999) organizational management and Elmore's (2004) school reform research. Pfieffer and Sutton's study of successful organizations found that people learn and change and act consistent with principles or a set of core values and an underlying philosophy. Organizations that turn knowledge into action are relentlessly action-oriented toward a common goal. Staff learned what to do from doing. This means that people accept new beliefs as a result of changing their behaviors that come from following a goal. Pfieffer and Sutton (1999) suggest that action can influence talk even more powerfully than talk influences action. Organizations that manage to turn knowledge into action do not take obstacles as reasons not to act. They frame the obstacle in terms of how it matches the school's vision and philosophy, and they work out how to get around it. Evidence of this was provided when staff at Patricia

Lake School was challenged by two students with severe behavior disorders. Staff experienced success with one student but not the other. Before choosing to send one of the two students to a designated special education program, staff decided to learn how to better support students with special educational needs in their own school. In sharing this story, the Inclusion Facilitator commented, "We had to do a lot of learning this year."

Organizational management includes site-based decision-making. Site-based decision-making was a feature of each school's organization. The ability of school staff to make their own decisions encouraged staff to learn more because they had the opportunity and responsibility to use their own knowledge to re-organize their schools. Decentralization of decision-making also facilitates the use of knowledge, because it is the people on the frontline who act on their decisions. Elmore's (2004) work on school reform found that teachers' collective expectations exercised a heavy influence on their individual conceptions of their responsibilities. When teachers are held accountable for meeting the shared expectations or philosophy of staff, internal accountability develops, which in turn affects a teacher's actions and behaviors. Responsibility, expectations and internal accountability become aligned to high expectations for students. Responsibility is personal and individual, and it stems from values and beliefs. Expectations are collective in nature and characterize the shared norms and values of the school staff. Inclusive and safe schools become so because the staff decided they should and believed that they could.

It is important to make a school's mission and vision that standard against which all organizational activities are reflected and evaluated. Chaskin, Brown, Venkatesh, and Vidal (2001) found that having such a strong connection is an important indicator of an organization's effectiveness. Their research found that well-informed and active staff provided ongoing feedback about how well the school was fulfilling its mission and how emerging needs and changes in the environment required changes in practice. A responsive principal further enhances the staff's knowledge and power and increases their role in shaping the school to be more responsive to the needs of all students, which was reflected in the participatory decision making process. Rosenholtz's (1989) empirical study of school effectiveness, found that there are various types of school cultures. A normative culture was characterized by an emphasis on collaboration and continual improvement. Such a culture developed when teachers focus on developing skills to achieve specific goals. Experimentation and failure were expected and accepted, because during this process, teachers are learning. Rosenholtz's study concluded that collegial support and professional development can effect improvement if they are connected to a coherent set of goals that give direction and lead to learning and collegiality.

In conclusion, the staffs in these four schools were most effective because of the close congruence between values, goals, and activities. Another conclusion that could be drawn from my findings relates to the power of a mission, vision, or belief statement. The values incorporated in these statements can be powerful in guiding the shape and nature of future policy development. If values can form a part of future policy, such values will not only entail a shifting of resources, but winning of hearts and minds (Thomas & Loxley, 2001) to shape attitudes and behaviours in support of new policy.

Commitment

The four staffs demonstrated a genuine commitment to promoting equality, holding high expectations, and working together for the greater benefit of all students. These commitments were also the outcomes of their efforts. Teacher statements such as, "When you come in our school you shouldn't be able to define special education or distinguish differences. Everyone is working together to feel a safe and cared for atmosphere, and everyone is accepted for who they are" and "our school is a place everyone is treated with dignity and respect." Staff needed to be committed to being consistent with agreed upon practices. "EBS is a really big thing in this school. Staff has bought into it and we have consensus to achieve that goal."

Commitment was the precursor to developing ownership. "We had staff involved in the decision-making, that way they have ownership by buying into what needed to be done" stated one principal. When staff was committed, they were better prepared for the challenges, and could weather the storms in a healthier and more productive manner. "Being in an inclusive school is not easy, it is a challenge. If you want to do it well you need to be ready for the ups and downs," commented one teacher on the supports needed to be successful. Another teacher commented that support from colleagues was important to be successful, "Any programs we have introduced together have made it more positive."

Being committed provided the extraordinary energy required to change practices in some fundamental way. The tight sense of mutual commitment was more likely to exert influence on every member of staff in terms of norms of good practice. Commitment provided a connective tissue to bind teachers together in a relationship of mutual obligation and force them to sort out issues of practice. Newmann and Wehlage's (1995) studies found that successful schools further strengthened both the commitment and competence of individual staff and the collective learning of the staff as a whole. To gain high acceptance of and commitment to the goals of inclusion or safe schools, teachers need to have a say in the development and implementation process. When staff makes a commitment to prevention and intervention, they will help build a positive environment where everyone feels safe, accepted and valued.

In successful transformations of organizations, the principal, plus other people with a commitment to improve performance, pull together as a team (Kotter, 1996). Effective and sustainable change requires commitment from the individuals from whom behavioural change is needed. Sustained commitment can only be realized when the affected individuals were involved and engaged in the planning the changes they are expected to execute. This process begins with a leader who is personally committed to an inclusive collaborative process, who is willing to encourage and nurture others to participate and take leadership roles (Lezotte, 2005).

There were many positive outcomes or success indicators reported by staff that served to illustrate the level of commitment made over time. The most important outcomes frequently mentioned by staff were not higher achievement on tests scores but something greater and more internally rewarding. Frequently, staff commented on the positive changes in the school and the improved behavior of students. My interpretations of staff responses indicated a great sense of staff's self-efficacy. The two major indicators of successes frequently identified by staff were related to increased happiness and positive values such as increased student respect and acceptance. What constituted this "happiness" could not be accurately determined. No one knows what happiness is (Gilbert, 2006). In helping to explain this concept of "happiness," Csikszentmihalyi's (2004) definition provided the most concise explanation. "Happiness is the ultimate goal of existence, the summum bonum or the good chief, in that while we desire other goods, we want happiness for its own sake" (p. 18). Staff comments on indicators of their success included, "I feel good internally," "Teachers are smiling," "It's seeing the fruits of your labor," "You see it in the children's eyes, their smile and when they walk down the hallway," and "when parents are thanking you." Student happiness engendered staff happiness, and the combination produced a tremendous feeling of satisfaction in each school. Happiness did not come from wanting to be happy. It came from working toward a goal greater than oneself. If inclusive education is accepted as "the unconditional commitment to integration, based firmly in principles of and concern for equality and parity of treatment for all students" (Fulcher, 1989, p.51), then it could be argued that the experiences of the staffs in the two inclusive schools achieved such a goal. Gilbert (2006) refers to this type of happiness as "moral happiness" (p. 33). Comments by staffs reflected their experiences in response to their change in practices. Staff comments also reflected a source of personal joy or sense of success, hence the concept of happiness.

What staff believed to be worth doing became intrinsically rewarding over time with each success experienced. Increased success over time resulted in their working harder and improving their efforts. Bandura (1997) cautioned that change places a premium on people's self-efficacy and their collective efficacy. People's level of motivation and subsequent actions are based more on what they believe than what is objectively true. Efficacy and belief in one's capability were sources of increased teacher action. "Self-efficacy refers to belief in one's capabilities to organize and execute a course of action required to produce change" (p. 3). It is not concerned with how many skills one has, but with what one believes one can do with the skills under varying conditions. Unless people believe they can produce the desired results by their actions, they have little incentive to act. Collective efficacy is more than the sum of an individual's efficacy or beliefs. Rather, it is "an emergent group-level attribute that is the product of coordinative and interactive dynamics" (Bandura, 1997, p. 247). A distinguishing feature of efficacious schools is the structuring of learning activities so as to promote a greater sense of personal capability and achievement in students. Poor academic achievement is not excused on the grounds of low ability or family background, but is treated as a learning opportunity. On the basis of the evidence analyzed in this study, inclusive education resulted, in part, from staff understanding and attempting to remove barriers to student learning. Student behavior was managed by promoting, recognizing and praising positive behavior rather than punishing students or only reacting to misbehaviours. Staffs in the schools studied were responsive to the needs of all students and did not use special needs eligibility as an excuse not to teach any student. Teachers with a strong sense of instructional efficacy created a positive school climate for academic learning by devoting a fair share of time to academic activities, conveying positive expectations of student achievement and rewarding student success. Collaboration, capacity building, and leadership are some of the attributes of a school's efficacy.

A second outcome was a focus on the positive values of acceptance, equality, and respect for all students. This focus provided students more than simple access to a regular classroom or a consistent discipline system. Inclusive and safe schools studied provided environments where students belonged, where all students were included in learning, and where tolerance and respect were fostered. This outcome was achieved because teachers became more responsive to the needs of all students, developed the pedagogical capacity, and were provided with additional support to differentiate instruction and implement a more effective behavior support system. Student achievement and improved behavior were evident in the annual results reported in each school's education plan. Staff found that, when teachers took the time to learn how to teach all students, this had a stronger effect on academic achievement. Orpinas and Horne (2006) wrote that it was important to create school rules based on the core values of the school. Each of the schools studied did this. The most frequent word in the rules of the schools studied was "respect." This concept was taught to students by all adults in all settings of the school and lack of respect was corrected in a supportive and constructive way. Teaching rules using brief examples promotes generalizability of skills in varying contexts, and the gains accompanying the feedback result in raising people's belief in their efficacy

(Bandura, 1997). In addition to acquiring academic competence, students became attached to the pro-social goals and behavior expectations. This may explain why it appeared to be easy for students who did not know me to take it upon them selves to escort me to the office.

Another indicator of success or outcome that was frequently mentioned or observed was the caring relationships established between students and staff. These relationships allowed students to experience a greater sense of belonging and acceptance. It also made it easier for students to talk about safety concerns and for staff to engage in problem-solving and conflict resolution skills with students. The schools in this study attended systematically to students' social needs, behavior problems were not observed and the quality of the relationships between students and staff were evident. Student artwork was frequently displayed throughout each school. Different groups of students were doing different projects to demonstrate learning. One mother of a severely disabled student brought her son to school, on a day when her son was at home with a cold, because the teacher called to inform her it was the day to take the class picture and students expressed concern that her son would not be in the picture.

These outcomes compare favorably to a review of effective programs that supported positive youth development by Catalano, Berglund, Ryan, Lonczak, and Hawkins (2004). Twenty-four programs showed significant improvements in problem behaviors of youth, including aggressive behaviors, truancy, smoking and substance abuse. Methods that were found to strengthen youth's social, emotional, behavioral, cognitive, and moral competency included improving relationships, setting clear standards for behavior, building self-efficacy, and increasing opportunities to be recognized. Students need to feel that teachers care about them, as this was one of the factors found in this study that resulted in higher student achievement and better behaviours.

Collaboration

Supports most frequently cited by staff to be successful included time for teachers to meet, share ideas, and consult with additional service providers. Teamwork was an important factor, which included involvement in decision-making and time to meet. Responses to what supports are needed included: "Being in an inclusive school is not easy, it is a challenge. If you want to do it well you need to be ready for the ups and downs." It was important for staff to help each other and also take advantage of the help that is available to them. "You have to work in groups and work with the help available. In time you learn how to get it done." "You have to collaboratively believe and have a reason for choosing the supports you need."

Collaboration is characterized by mutual decision making to resolve problems of practice (Kruse, 1999). Often the words *collaborate* and *cooperate* are used interchangeably, but they are conceptually different. Cooperation is the most basic level of social and intellectual interaction among teachers. It does not require that teachers have a shared set of values or a common belief system (Kruse, 1999). All staff members interviewed consistently identified collaboration and teamwork as a key to their success in practice and as an important source of additional support. Staff comments included, "If you want an inclusive school you need to have support from others," "support from your colleagues," "we share our expertise with others," "we have monthly committee meetings," "everyone works collaboratively," and "we work together, share ideas as well as welcoming new ideas." The frequent use of the pronoun "we" was significant as it conveyed philosophical cohesion. In analyzing the practices of the teachers, I concluded that ordinary teachers working together provided the best starting point for collaboration. Time to work together was a valuable resource in the four schools studied.

A collaborative school culture has, at its foundation, a focus on a mission or central purpose. This requires trust and respect among the staff. Collaborative planning sets the tone and standard for working and learning together. When teachers collaborate they engage in mutual decision-making to resolve problems of practice. Collaboration is when teachers are seen discussing, sharing, and developing trust and respect for each other. Little (1990) refers to this as "joint work" and she defines it as the shared responsibility of teaching and collective action. In her research on teacher autonomy and collaboration among teachers, Little (1990) found that teachers who collaborated were motivated to participate with other teachers because it helped them succeed in their own work. Teachers' capacity to teach was increased because of their access to a larger pool of ideas, methods, and materials. Little's studies also found that collaboration with colleagues on matters of school-wide importance shaped teachers' sense of self as a classroom teacher, member of staff, and member of the profession. When applied to using the collective capacity of all staff, collaboration is arguably improved by joint decision-making, especially on matters of school-wide concern such as student behavior and inclusion of students with special needs. Little's conclusion is that joint work is worth the investment of time and pays off richly in the form of better solutions to instructional problems and remarkable gains in student achievement. Teaching becomes everyone's business, and each person's success is everyone's responsibility.

Schools were organized into "professional learning communities" and time for staff to work together was typically structured into the weekly timetable for staff. A professional learning community is exactly what the name implies: communities where diverse people have a shared commitment to a common purpose, to each other in pursuing that purpose; and diverse views on the collective decision-making process. The learning community is professional in how the members value difference, disagreement, and debate about the best way to identify and implement improvements and in how to promote and bring together data, knowledge, and intuition (Hargreaves & Fink, 2006).

Professional learning communities were found to help sustain a school's planning process. Staff were able to build strong positive relationships over time. The work of DuFour, Eaker, and DuFour (2005a, 2005b) indicates that true school improvement represents the collective wisdom of staff when they find common ground. Fullan (2005) believes that informed professional judgment is a collective quality, not just an individual quality. A professional learning community is based on a shared set of beliefs or expectations, and the unifying principle is that staff have not fulfilled their purpose until all students have achieved to high levels (DuFour et al., 2005b). This requires a change in focus on teaching to learning and learning and this focus needs to be embraced as the mission of a school (DuFour et al., 2005a). At their best, professional learning communities bring the ability and energy level of the whole staff forward in service to students. Well-developed professional learning communities are a powerful means to teaching new skills with professional learning to produce complex, intelligent behaviors in teachers (Sparks, 2005). This concept will not become the norm in schools unless leaders embed collaboration in the routine practices of the school and provide the structures. Profound professional learning communities produce teachers and administrators who say what they have not said, believe what they have not believed, understand what they have not understood, and do what they have not done. Although there are no limits to what can be achieved as a professional learning community, Sparks outlines the barriers. These include a lack of clarity about values, intentions, and beliefs; dependence on those outside the school for solutions to problems; and a sense of resignation that robs educators of the energy essential for continual improvement.

The benefits for staff in this study included becoming empowered through collaborative decision-making, shared ownership of problems, exchange of skills, and generation of local solutions. Collaborative teams enhanced teachers' skills for educating a diverse student body and holding high expectations for appropriate behaviors. Staff in the schools studied expected improvements in students' academic skills and behaviour.

Thousand and Villa (2000), strong advocates for inclusive education, believe that collaborative teams enhance teachers' potential for survival by creating regular opportunities for exchange of needed resources, expertise, and technical assistance. In collaborative teams, teachers experience a sense of belonging and freedom from isolation by having others to turn to who share the same responsibilities. Villa, Thousand, Nevin, and Malgeri (1996) examined collaboration in inclusive schools and concluded that it could no longer be a voluntary act. They believe that collaboration enables adults to increase their problem solving and instructional capacities while modeling for students the importance of working together. Teachers in this study modeled collaboration and invited students to do the same. Staff and students acquired the skills, knowledge and dispositions to collaborate, and improvements occurred in student behaviors and learning.

Principals in the schools studied provided structured opportunities for teachers to engage in meaningful dialogue. Ongoing collaborative planning time for teachers to meet and talk was provided in the weekly timetables. Principals also established various working groups (e.g., ESB team, teacher pods, and committees to receive training and provide staff ongoing support). These working groups provided staff with help, support and encouragement to improve practice and were available for discussing problems. Ainscow (1991) found that working groups succeeded when they were carefully structured to ensure active participation and focused on achieving a goal. Task-oriented discussion, planning, and problem-solving as well as mutual support should dominate these meetings.

Staff took responsibility for their own professional development and learned new skills and ideas from each other. When given the opportunity to collaborate, much of the expertise needed was available among staff. Collaborative practices provided teachers with an important and powerful strategy for developing an inclusive and safe school. Ainscow's (1999) experience with successful inclusion projects revealed that teachers frequently know more than they use. Perhaps we need to think less about bringing in outside experts and focus more on finding ways to make better use of collective knowledge. The task of administrators becomes one of ensuring that teachers have regular collaborative planning times and that these become central to the day-to-day work.

Capacity

How the curriculum was implemented was an important aspect of the inclusive schools. The effectiveness of the discipline system was an important aspect of the safe and caring schools. The curriculum and discipline system both required changes by staff. Staff in each school had to transform their teaching practices to support the needs of all students better. How staff did this was planned systematically. “We had to figure out what students need in order to be successful.” “Inclusion was difficult at times. You can get overloaded in the classroom, with a wide diversity of students and the demands of the curriculum.”

Staff made incremental adjustments to existing practices and, with increased skills and knowledge, developed their capacity to teach more diverse students and manage more serious behaviors, thus altering their practices. Building staff capacity was an important factor that affected the instructional environments. It really was learning in context, and I believe that it had a paid off because it resulted in higher levels of staff knowledge and skills, greater confidence and better support structures.

Fullan (2005a) defined capacity building as the “daily habit of working together” (p. 4) and added that one cannot learn this from a workshop. One learns by doing and getting better at doing. Capacity building involves “developing the collective ability, the dispositions, skills, knowledge, motivation and resources, together to bring about positive change" (p. 4). Capacity implies that a community can act in particular ways and has specific powers to do certain tasks. Chaskin et al. (2001) studied community capacity and defined capacity as "the interaction of human capital, organizational resources, and social capital within a given community that can be leveraged to solve collective problems and improve or maintain the well-being of that community (p. 7). The foundation for building capacity is a sense of community, a commitment among its members, the ability to solve problems and access resources. When applied to a school setting, King and Newmann (2000) define school capacity as "teachers' knowledge, skills as well as the strength of the professional community and the coherence of the school program" (p. 577).

An example of capacity building was found in the implementation of the behavior support system at Lake Beauvert School. Before implementation, staff was concerned about student conduct and this was affecting enrollment. Three years later, the result were increased enrollment and "respect is carried outside the school." It amounted to three simple rules that all staff implemented, and students understood and followed. The rules were the same for all students in all settings and enforced by all staff. This system uses such rules to set clear expectations for student behavior. The rules in three of the schools emphasized respect, such as "respect yourself, respect others, respect property, respect learning." The rules were stated positively, were continuously reinforced and modeled by all adults in the schools. Students understood the rules, were provided examples of appropriate behavior and were provided incentives for following the rules, in the form of prizes, awards and being put in the spotlight at school assemblies or featured in school newsletters. This is a basic social learning principle (Orpinas & Horne, 2006). People tend to maintain behaviors for which they consistently receive rewards, and for which they are not punished. Although the system may appear simple, its effectiveness was a result of staff training and ongoing discussions about making it a contextual fit.

Building capacity was also evidenced in the collective capacity of staff to achieve their goals, and this came through job-embedded learning. Professional learning communities dig deeply into learning (Fullan, 2005b) and, when they are used to build capacity, policies, practices, and activities, such "communities" increases the collective power of staff to improve student learning continually. Newmann, King, and Young (2000) suggested that, in theory, school capacity should come from the connections between policy and programs at the district level. Schnorr, Paetow, and Putman (2005) also suggest that district-level planning and commitment are fundamental to successful inclusion. However, neither these researchers, nor I, could find any evidence to support this as true. Perhaps this is because policy development is often too political and superficial to develop capacity (Fullan, 2005b).

Staff met often in each of the schools in addition to what was scheduled as common planning times and staff meetings. Regular meetings were mainly focused on meeting the needs of students or refining pedagogy. Teachers also shared strategies and ideas to help all students feel included, respected and cared for, and taught the students to do the same for each other. Staff was involved in all aspects of the process to achieve their vision and goals: whether to implement the inclusive practices or the behavior support system; whom to involve; when to receive training;

what support was needed; and evaluation of the outcomes. These elements are the same as the foundation for preventing school problems (Zins, Elias, Greenberg, & Weissberg, 2000) and for inclusive schools (Ainscow, 1991). Staff required pedagogical support to close the gap between their vision and their current practices. For the schools in this study, the pedagogical support needed was how to differentiate instruction or implementing an effective behavior support system. The design and use of pedagogy arose from the teachers' perceptions about what would be most beneficial for their students.

It was interesting to observe the number of meetings focused on individual students. This is common practice in special education and implies that such meetings can become common practice in regular schools. Ainscow (2000) considers this planning in action. The process of planning, rather than the plans themselves, is important. Although planning was a requirement of staff who work in these schools, it provided ongoing support and encouragement to individual teachers. It was through these shared experiences that colleagues helped each other and were able to tell me what they did that resulted in their successes. Ainscow's (1991) research on effective schools for all found that a significant hallmark of an inclusive school was the degree to which teachers in it were prepared to adjust their usual practices in the light of the feedback they received from students and colleagues. Thus the schools are what Senge (1989) calls a "learning organization" (p. 14), an organization that is continually expanding its capacity to create its future. A learning organization is a group of people who function together in an extraordinary way to achieve a common vision. If schools wish to enhance their organization's capacity for learning, developing strong professional learning communities should be considered.

Culture

Culture consists of the shared values and beliefs in an organization and is a complex pattern of norms, attitudes, beliefs, behaviors, values and traditions that are deeply engrained (Barth, 2002). Individual responses to how staff defined their school, their values and recommendations revealed consistent beliefs and values. "We are respectful of every individual regardless of their abilities," "To gain respect we have to give respect," "Personally we do a lot of role modeling," and "what we do is difficult to define because it is a feeling" as well as describing the school as the "place where all kids matter."

Culture refers to the things that people agree on to be true and right. It is the general atmosphere of a school, how people speak to each other and the images and displays throughout the school. A school's culture dictates the "way we do things around here," and the school's culture has more influence on life and learning than the superintendent (Barth, 2002). A teacher in one of the safe and caring schools stated in response to what her values were that "Working together, being positive, role modeling, showing respect and following the same guidelines makes it easier for everyone."

Changing school cultures for the better is difficult, but as these schools showed, it is not impossible. Every school's culture can work for or against improvement or reform. Unless teachers are involved in changing the culture of the school, the success of future initiatives or policies will be at risk. Culture was developed through capacity building and professional learning communities, both of which were present in the inclusive and safe schools studied.

Values are best learned through experience and direct teaching. Students will learn important values if they experience them in their relationships with teachers, school administrators, and peers, as well as through the curriculum, extracurricular activities, and the general school environment. The relationships of staff with students are the medium through which values are experienced. If we, as educators, preach fairness and tolerance, we must also practice these values, or we will have no credibility with the students (MacKay & Burt-Gerrans, 2002). Schools are more inclusive and safer when staff are warm, engaged, responsive, and hold high expectations for students. When students believe that staff is caring and fair, they trust the staff to protect them from harm. The cultural norms and attitudes that promote an inclusive and safe school must rest on a foundation of caring, trust, mutual respect, and understanding of students by staff.

Acceptability of violent behaviour is about prevailing norms, not only individuals' attitudes and behaviors, but also individuals' perceptions of others' attitudes and behaviors (CHEF, 1997). The school is where young people spend a large part of their lives and, over time, develop beliefs about the acceptance of violence and the ability of peers who are different. The four schools studied shared a positive, caring, and welcoming ethos. Positive attitudes were more than just volunteering to be part of this study. They were demonstrated in how staff talked to students, taking time to listen to students, to help each other construct a lesson and to ensure that collaborative meeting times were well used. Staff modeled a culture of respect for themselves as well as the students. The Inclusion Facilitator in Patricia Lake School and the Special Education Coordinator in Maligne Lake School could be referred to as a *caring expert*. This type of expert is defined by Von Krogh, Ichijo, and Nonaka (2000) as a staff member who reaches his or her level of personal mastery in knowledge and understands that he or she is responsible for sharing this knowledge with others. These positions were created by the respective school principals, and they made collaborative planning time a priority. This served to reinforce the habits of knowledge creation and exchange (Fullan, 2001).

Block (1993) said that changing an organization begins with changing the conversations in it. If people are able to share ideas about issues they see as important, that sharing itself creates a learning culture (Dixon, 2000). Sharing practices is a route to creating collaborative cultures (Fullan, 2001). Collaborative cultures created and sustained inclusive and safe schools.

Ownership

The successful implementation of policy that resulted in inclusive and safe school practices was the result of staff ownership of the process. Being a teacher in one of the four schools studied meant that one needed to be able to respond to questions asked about one's beliefs, ideas and suggestions for practice. Ownership was achieved when staff became part of the process and actively participated in decision-making. Adults used no excuse or defense that enabled poor behavior or nonacceptance of some students. Instead, the adults communicated high expectations and equal respect for all students. Staff comments included: "We made a conscious decision to include all students with special needs into all classrooms," "make time to immerse yourself in learning," "I am prepared to do what I have to do," "it is my job, I need to do this," "it is what you believe in and take ownership for," "everyone has ownership in how the school looks and how inviting it is" and, "taking ownership is crucial."

In each of the schools studied, staffs' ability to share expertise and resources created what Peters (2005) called a "unity of purpose" (p. 156). This created an empowerment with responsibility. It resulted in a shift in thinking about the purpose for students with special needs to be in regular classrooms and why it was important for staff to teach respectful behaviours. To align staff's beliefs with available resources and supports, both Patricia Lake School and Maligne Lake School made a group decision to kept students with special education needs instead of referring these students to other schools or programs. Such a change in practice began with the belief of staff that something different needed to be done. In the end, the change supported a more inclusive philosophy that benefited all students rather than some students. The changes also provided alignment and greater coherence to each school's mission or vision statement.

Staff ownership of the process of change was important. It resulted in a more responsive school climate that viewed problems as challenges to be overcome. Internal commitment to the change process is important (Baird-Wilkerson, 2003). Quinn (1996) categorized the change process as being either deep or incremental. Quinn argued that deep change requires new ways of thinking. It is major in scope and generally irreversible. Incremental change is the inverse. Change occurred when school staff made a decision, owned the change process and, these were propelled by the school's mission statement.

Mezirow (1997) identified the learning process that brings about change in attitudes and beliefs as "transformational learning" (p. 5). This type of learning occurs when adults acquire a coherent body of experiences, concepts, or associations that frames their reference for the future. My analysis of the data in this study suggests that teachers experienced a transformational shift in their perceptions and beliefs about the capabilities of students with disabilities, as they gained more positive experiences while teaching them. This commitment can only be sustained when staff remain committed and being what Lezotte (2005) refers to as "keepers of the culture" (p. 183).

The reality principle, a term coined by Gersten, Woodward, and Morvani (2002), is used to explain that there must be a good fit between instructional practices and the day-to-day classroom realities of teachers. The reality principle means that context matters. Regular teachers do not necessarily have the time or expertise to individualize programs fully for every student learning in a large-group context. They need support, advice, and assistance from other staff. Ainscow (1991) argued that the preoccupation with individualized program plans has deflected attention away from creating collegial practices that are needed for diverse learners in a given classroom. He further argued that grouping students according to conditions or labels has resulted in exaggerating differences and often creates a sense of fear in regular teachers about their ability to teach diverse students. Teachers in this study who had a say in professional development, were provided pedagogical support or a support network, adopted and used research-based practices in their classrooms, which in principle, fit their reality.

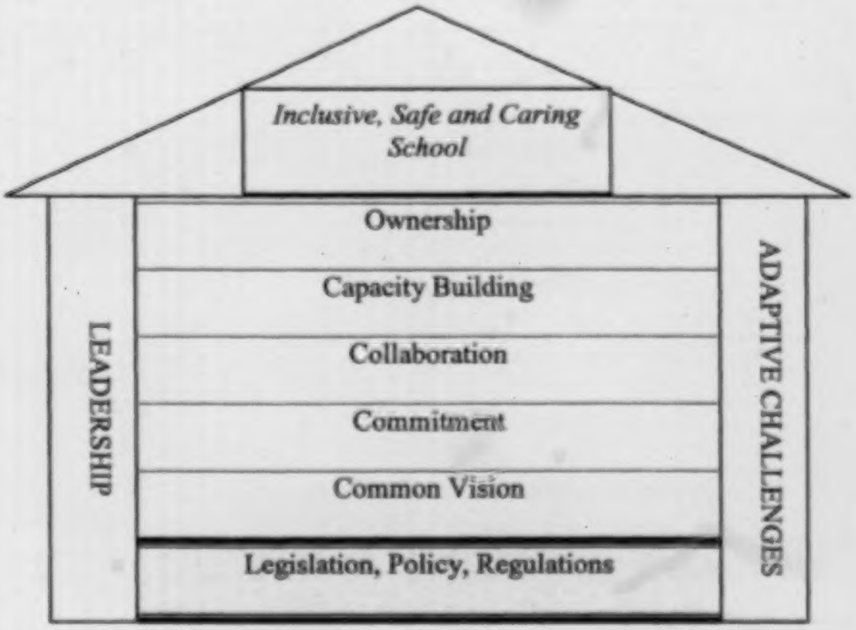
The roles of the inclusion facilitator or special education coordinator were excellent examples of support. These positions are assigned to teachers on staff who had expertise and knowledge of each school's context. Teachers had immediate and direct access to this collegial support. Maijer (2001) studies on inclusive education and effective classroom practices found that teachers have a small circle in which they look for answers to their questions. They consult with colleagues or professionals in or close to the school. It can be assumed that teachers learn from significant key persons in their immediate environment. It can be argued from Maijer's study that teachers need immediate responses to assist them in effectively teaching to student differences. Enhancing teachers' professional knowledge through the use of school-based learning teams and Inclusion Facilitators or Coordinators are ways of providing the necessary resources to support inclusive education.

A sense of ownership increases one's incentive to do a good job. Principals must be willing to relinquish operational control and serve as facilitators who provide the resources, guidance, and support for the staff to do their work. If organizational outcomes are to be achieved through the concerted efforts of others, Bandura (1997) believes that the most important decisions involve how to use human talent and motivate the efforts of others. Goals must be explicit so that people know what they are aiming for, know how they are doing and make the changes needed to achieve success. A group's success requires linking tasks, roles, and skills to work in concert to achieve outcomes. By providing staff with these supports, principals developed the collective efficacy for staff to create inclusive and safer schools through the strengths of their beliefs systems.

Interrelating the Connecting Factors

The interrelationship between the connecting factors is illustrated in Figure 1: An Inclusive, Safe and Caring School.

Figure 1: An Inclusive, Safe and Caring School



In schools that were successful in providing an inclusive education and a safe and caring environment, school staffs owned the process and organized themselves accordingly. This theory is influenced and sustained by what staff said and did individually and collectively. This theory emerged from the value of a common vision or purpose, was reflected in consistency and collaborative practices which built was built upon a commitment that lead to developing staffs' capacity and ultimately, ownership of the process. The result was a more positive learning environment for all. Inclusive education and safe school environments were not the direct result of a written provincial or district policy statement.

This case study may not necessarily be generalizable or have wider applications to other schools, but there are lessons to be drawn from the major findings. The connecting factors between inclusive and safe schools were similar to findings by many other researchers (Ainscow, 1991, Gottfredson, 1997, Orpinas & Horne, 2006). Gottfredson's study of what works and what does not to prevent violence in American schools showed that a school culture that was positive, inclusive and accepting of all students was a key component in effective schools. A recommendation of Gottfreson's national research included creating and promoting positive values on how to treat others. Civility, caring, and respect needed to be clearly communicated in the school rules and through the behavior expectations of students. Orpinas and Horne (2006) concluded that a reduction in bullying, by itself, does not translate into a healthy and inviting school community. Schools need to increase the positive qualities of the environment in which students learn. Staff needs to provide opportunities for students to learn the social skills that will help them establish both positive relationships with peers and the academic skills needed to succeed in school. It is important to create a culture that supports healthy interactions and problem-solving. Schools that are successful in providing a safe environment are inclusive places where individual differences are celebrated and valued.

The process of what happens to a common vision when it is translated into action becomes the technology of inclusive and safe schools. The process was not found to be a linear process. Staff commitment to the process was a condition to move to creating more inclusive, safe and caring schools. The technology includes the connecting factors between collaborating, building capacity, establishing a culture, and staff ownership of the process. These are also features or conditions found in other initiatives related to improving or reforming schools. What is the "glue" that bonds the features of this technology together? The glue that reformed each school in this study was discovered to be distributing leadership and adapting to challenges. Both are discussed in the next chapter in relation to the overall interpretation of this study's findings.

A Caveat

One caveat was found in this study. It related to the inclusion of a student with severe behavior disorders who presented a danger to other students in the school. In both inclusive schools, staffs expressed concerns and defined the limits to inclusive education. In the responses to defining an inclusive school, staff responses included: "The only boundary that I draw is in regards to student safety." "Inclusion is not the expense of anyone getting hurt," and "you have the draw the line on behaviours that hurt."

The staff members in one school were faced with the challenge of finding innovative ways to support one student identified with severe oppositional defiance disorders and when the parent demanded placement in a regular classroom. Staff had developed an individualized program plan, brainstormed strategies to support the student and held a number of case conferences with the parent. The student's behaviour escalated over a period of about six months. A teaching assistant was hired to provide support and became so frustrated that she quit. The second teaching assistant was also unsuccessful. After a series of additional intervention plans were attempted, and the services of a behavior specialist maximized, staff concluded that they were no longer able to meet the educational needs of this student in a regular classroom. Staff agreed that they needed to find another more intensive and supportive educational program than the school could provide.

This particular student challenged the limits to inclusive education and a safe school. Behavior that is truly disordered cannot be tolerated without serious risk, either to others in the environment, to the child him or herself or both (Kauffman, Bantz & McCullough, 2002). This led me to examine the literature to determine if students with behavior disorders are best supported by inclusive education practices. The literature revealed that this was not the case. Some students' disabilities require distinctive places for instruction of their educational needs are to be met. Kauffman & Hallahan (1995), Kauffman, Lloyd, Baker, and Riedel (1995) and Kauffman, Bantz, and McCullough (2002) have continually argued for separate classes and preservation of the continuum of alternative placements for some students, especially students with severe behavior disorders. The authors contend that students' behavior differences require more intensive instruction than can be provided in a regular classroom. Inclusive educational practices for students with behavior disorders have not had generally positive outcomes. By the time children reach early adolescence, a history of antisocial behavior and rejection by peers and adults has been firmly established. Limiting positive outcomes for students with behavior disorders are unavailable appropriate support services in schools, lack of collaborative planning among service providers, and lack of coordination of intervention among the youth's home, school, and community environments (Knitzner, 1993). Reasons cited for lack of effective intervention include conceptual biases on part of school personnel, structural disincentives of various agencies that serve children with behavior disorders, disagreements about practices among professionals, and a lack of focus on the instructional needs of these children. Other researchers have concluded that a consistent approach to the management of behaviors is needed.

The legal limit to inclusive education due to student safety was found in the Ontario Superior Court 2002 decision of *Bonnah v. Ottawa-Carleton District School Board.* This Court determined that school safety took precedence over placement of students with special education needs in regular classrooms. This Court supported the administrative transfer of a student in Grade 2 to a special education classroom due to the severity of the student's behaviour.

The best resources to support students with behavior problems were found to include collaboration and teamwork (Sailor, 1996). Staff in this study had these resources in place. The school with the student with severe behaviour disorders had additional support services, used collaborative planning, demonstrated consistency of behaviour expectations and remained focused on the instructional needs of this student. Efforts to include this student with severe oppositional defiance were viewed as a problem for all staff to solve. In the school where this issue arose, the management of students with behavior difficulties was a school-wide responsibility owned by the whole staff. It was not the sole responsibility of the teacher or the teaching assistant. Therefore, collaboration and teamwork, by themselves, was insufficient to support the needs of students with severe behaviour disorders.

The caveat found in this study indicates that understanding and supporting students with severe behavior disorders in regular classrooms requires further examination. Even when the resources recommended in the literature were provided, staff was unable to find success despite their best efforts. This caveat suggests there is a limit to inclusive education.

Summary

Successful inclusive and safe schools were established when school staff owned the process and were supported throughout. Successful implementation did not depend on one specific program or policy statement, but on the common vision, commitment, collaboration and capacity of staff. This is what Newmann and Wehlage (1995) refer to as "will and skill" (p. 1). In observing and interviewing school staff, my focus was on trying to understand what they said and did that resulted in a school becoming inclusive and safe. The staffs' effectiveness depended on how well the vision and beliefs were connected to the other factors; use of consistent practices and additional supports to develop the professional capacity of staff. This developed the organization's capacity and was a result of staff leadership. An inclusive, safe and caring school was not the result of a written policy statement. One caveat was found in one of the schools studied that challenged the limits to inclusive education. This suggested that there may need to be a limit to full inclusion and the ability to successfully include all students with severe emotional or behaviour disorders.

Chapter 7

ANALYSIS OF INTREPRETATIONS

Introduction

An inclusive and safe school is not just one that accommodates student diversity and responds to behaviors. It is about creating a school that is capable of continual improvement. Ultimately, though, creating such schools was a result of successful implementation of policy by school staff at the school level. It was not a result of a written policy statement.

In this chapter, I provide a broader interpretation of this study's findings on the connecting factors and then use the literature to explain these findings as they related to the schools that developed the organizational capacity for change. This analysis of the connecting policy factors was obtained through the process of clustering these factors and then constantly comparing their interconnectedness. The core variable connecting inclusive schools with safe and caring schools was staff ownership of the process. In my subsequent analysis of the core variable and examination of how the factors were connected, I concluded that the gap between policy and practice should not be as wide as it is currently is in many other schools. Like any other reform effort, closing the gap required leadership and adapting to local challenges.

Any effort to improve teaching and instruction of students should be carefully approached, based on promising or preferred practices and evaluated carefully before reaching any conclusions (Sugai, Bullis & Cumland, 1997). This chapter focuses on providing the supporting empirical research that lead to the positive effects of the respective policies under study. The glue that held the connecting policy factors together was found to be sharing leadership, adapting to challenges, and bridging policy to practice.

Leadership

Change in each of the schools began with a decision, followed by a period of organization, as staff initiated a new process with students. The role of the principal was most important in the initial stages. The principal's role included letting go of the decision-making process, providing authority for staff to make decisions, allocating resources and supports, and helping to solve difficult problems. Eventually, teachers became the leaders and relied more on their own authority as their confidence grew. Staff comments reflective of the leadership needed to be successful included "administration that backs you to take risks," "administration that will listen and try to help you with whatever," "you need the backing of administration and free reign" and "fundamentally, we [staff] have made a lot of decisions."

Lambert (2005) studied 15 schools that built high leadership capacity that sustained improvements. She found that shared governance and distributed leadership built around a vision-driven, student-focused framework, improved the schools. In each school, the principal played a major role by sharing leadership. The principals did this through a strong belief in equity and the democratic process, knowledge of the work, and building capacity in staff to take on more leadership roles. Inclusive and safe schools were achieved by distributing the responsibility for leadership among staff.

Distributed leadership is defined by Elmore (2000) as “enhancing and using the skills and knowledge of the people in the organization, creating a common culture of expectations around the use of those skills and knowing, holding the various pieces of the organization together in a productive relationship with each other, and holding individuals accountable for their contributions to the collective result” (p. 15). From this definition, leadership becomes the professional work of everybody in the school. Lambert (2002) believes that leadership is an essential aspect of an educator’s professional life. Based on her study, she defined leadership capacity as “broad-based skill participation in the work of leadership” (p. 9), where learning and instructional leadership become merged into professional practice. For teachers to become leaders, leadership needs to be distributed among them.

Northouse’s (2004) studies on leadership in schools identified about 65 definitions to explain the concept of leadership. Some definitions view leadership as the means to lead group processes. The leader is at the center of group change and embodies the will of the group. Another definition conceptualizes leadership from a personality perspective, which suggests that leadership is a combination of special traits or characteristics that a person possesses to enable him or her to persuade others to accomplish tasks. Other definitions view leadership as an act or behavior that brings about change in a group. Another view is that is an instrument to help others achieve a goal. This view includes leadership that transforms people through vision and role-modeling. A final view addresses leadership from a skill perspective.

These viewpoints stress capabilities or knowledge and skills that make leadership in others possible.

Northouse (2004) found central to all of these definitions: leadership is a process, it involves influence, it occurs in a group context, and involves goal attainment. These components of leadership were evidenced in all four schools I studied. When leadership is seen in this light, it involves everyone, not only the formally designated leader. My findings in each of the four schools show that leadership matters. When it is distributed and shared among staff, they know what to do, how, and why. Drago-Severson (2005) examined how 25 school leaders understood the practices that supported teacher learning. She found that principals who strove to foster healthy school climates sustained adult learning when they demonstrated that they cared for teacher learning. Involving teachers in making decisions and inviting them to shape and consider the school's mission and its relationship to daily practices were important factors that contributed to teacher learning. Hargreaves and Fink (2004) studied the change process in eight high schools. They found that a key force leading to meaningful long-term change was leadership sustainability. Sustained leadership was distributing leadership throughout the school community, making it a shared responsibility among all staff. Elmore's (2004) work on school reform efforts found that it is important to focus leadership on instructional improvement and define everything else around it. As the schools in this study became more inclusive and safe, the staff also became more collaborative and responsive to student needs. Staff worked together, shared their knowledge and expertise, and developed pedagogical capacity to differentiate instruction and improve student behaviour.

It is important to know when the knowledge and skills of staff are not equal to the problem they are trying to solve, how to get needed knowledge and skills, and bring it into the organization (Elmore, 2000). Carrington and Elkins (2005) compared traditional and inclusive school cultures and found no single model for organizing supports for students with different learning needs. Elmore's (2004) work on school reform found that successful reform comes from the inside out and involves collective problem-solving, structured by a common set of expectations about what constitutes a good result. Schools in this study had a common vision. Staffs were involved in the development of each vision statement and they were held accountable by the schools' leaders to achieve the mission of each school.

Inclusiveness came about in Maligne Lake and Laurier Lake schools as a result of the school's ability to obtain additional special education funding if students remained in the school. Student conduct in Lake Beauvert School was contributing to reduced enrollment, and the focus on school safety was primarily in response to the threat of decreasing enrolment. Regardless of the need for change in each school studied, the result of the efforts of staff transformed each school's culture. The challenge remains with sustaining the efforts and the momentum gained by staff.

One criterion used to select schools for study included having three or more years experience with inclusive education or providing a safe and caring school. A delimitation of this study included the purposeful selection of school staff to capture their perceptions, experiences and actions. This attempted to capture the history of the change process. These criteria were useful to examine the issue of sustainability of reform efforts. In a study on successful school reform, Chrisman (2005) found sustainability of successful school reform efforts was based on the quality of teacher leadership and the effectiveness of the instructional practices. Three conditions need to be present: Teachers need ample opportunities to make decisions, to review student work, and to discuss how to improve instruction; teachers need to use student feedback and achievement data to determine which instructional strategies were most effective; and teachers need to develop their own internal leadership structures to support one another. This study also found that teachers in successful schools made policy decisions and implemented these decisions themselves. Chrisman's study supports the idea that the solution to sustaining successful practices first lies in the need to share leadership with teachers, and second, in providing teachers with support to sustain their efforts over the long term.

The core meaning of *sustain* is to hold up, bear weight of, or bear without collapse (Hargreaves & Fink, 2006). Using Hargreaves and Fink's definition, sustainability of inclusive and safe schools becomes the responsibility of staff. Change in education is easy to propose, difficult to implement, and extraordinarily difficult to sustain. Findings from a study on teachers' sustained use of research-based practices found that teachers used those practices that were feasible, appropriate to their students, were accompanied by the necessary materials and professional development, and could be individualized to fit the context of their classrooms (Boardman, Arguelles, Vaughn, Hughes, & Klinger, 2005). Praisner (2003) surveyed 408 elementary school principals on their attitudes toward inclusion and found that only one principal in five held a positive view. Principals with the most positive views had more experiences. If the role of a school principal is to support all students and a positive view of the students prevails, then this view may become consistent with a school's mission statement. When all students really means "all" students, teacher knowledge, skills and the technology will be developed to make it possible for all students to benefit from learning (Schriner, Ysseldyke, Thurlow, & Honetschlager, 1994). If inclusive and safe schools are to become a reality, successful experiences strongly influence positive attitudes of principals. Sustainability, then, is a result of distributing the leadership among teachers and principal providing support as needed.

Inclusive and safe schools will be sustained if the policies are integrated and complementary and aligned to other policies. Integration of policies is achievable when staff evaluates every procedure, practice, norm, and ritual operating in the school to ensure compliance with the school's mission or vision. Many of these are so often taken for granted and accepted as normal that the full effect of inclusion and school safety may not be realized (MacKay, 2006). Fullan (1994) challenged educators to engage in comprehensive reforms and not to consider initiative one at a time. The findings from this study proved otherwise. In each school studied, staff focused on one initiative at a time until they felt confident that their efforts were paying off. Staff then used the same process to implement the next initiative. For example, Patricia Lake School had successfully implemented a safe school environment, and this laid the foundations for moving to a fully inclusive environment. Maligne Lake School's ability to make decisions based on their behavior data served as a starting point for moving into assessment for learning. Sustainability in one area resulted in a ripple effect to support new initiatives.

It is possible for a school to make significant changes, but changes need to be sustained in the face of other competing initiatives or policies. Government has a crowded agenda for schools. If inclusive and safe schools are seen to compete with other initiatives, such as ensuring daily physical education activities or implementing a second language program, progress in any of these initiatives may be limited. New or other policy initiatives could be sustained when the intent or purpose reflects the needs of all students and is aligned with other policy initiatives. For example, ensuring daily physical education activities must consider how a student with limited mobility is able to participate, or how a student who is deaf is able to participate in an initiative for all students to learn a second language.

Adaptive Challenges

School leaders are key (Peterson & Deal, 1998) as they are stewards of the change process (DiPaola, Tschannen-Moran, & Walter-Thomas, 2004) and understand the necessity of winning staff support for new initiatives. Change becomes a challenge when procedures or a clearly delineated process do not exist. Change also becomes a challenge when the knowledge and skills of staff are not equal to the extent of the change being proposed. The change process used by staffs in this study to develop more inclusive or safe schools included the ability to respond to technical and adaptive problems. The technical problems were solved because staff had procedures in place or a process to follow. Developing a mission statement, scheduling weekly collaborative planning time and developing school rules, were examples of technical problems. Operational procedures help to solve technical challenges. For example, the two schools that moved to full inclusion received additional special education funding to provide additional supports for students and staff. Conventional policy development is largely a technical process. In its most basic form, policy development entails identifying a problem, selecting an objective, identifying how to achieve that objective, assessing solutions, adding support, and then convincing others that the problem will be solved with one of the solutions.

However, developing inclusive teaching practices and increasing students' ability to respect others were much more difficult. These are examples of adaptive challenges. Adaptive challenges have no readily available solutions. When problems arose that were outside the expertise of school staffs, the problems required staff to generate solutions and ideas. Heifetz (1994) defines an "adaptive challenge" as problems that can not be solved with a set of procedures or a check list of things to do or with traditional teaching or behavior management strategies. Adaptive challenges have four properties: the challenge consists of a gap between aspiration and reality; it demands a response outside the current repertoire of skills; the work required to narrow the gap involves new learning; and the people with the problem are the problem and the solution (Fullan, 2005a).

The adaptive challenge of creating inclusive and safe schools required leadership to engage staff to make progress on the problems they face. The task of the leader is to direct the staff development process and keep attention focused finding a solution, continually question and challenge assumptions. An example of a leader engaged in an adaptive challenge was the principal at Patricia Lake School. Her response to what an inclusive school would look like in practice included "The fight is against the organization and scheduling and putting the child's individual needs first" Another example is the statement of the Inclusion Facilitator, "If you say you are committed to teaching every child, how does that sit with the value of kicking some out or not accepting some students?" To be successful at adaptive challenges, a school's culture needs to welcome problem-solving and creative brain-storming.

Creating inclusive and safe schools was not easy as the process incorporates many challenges that had to be adapted to the context or the reality principle of each school. Although there are certain ingredients that can assist in developing schools that are effective for students, there is no simple recipe (Ainscow, 2000). Schools are idiosyncratic, each with its own circumstances and profile. Each school had to develop its own way forward, and improvement was driven from the inside out. If some students are bullying others and staffs believe in the importance of providing a safe and caring school environment that fosters and maintains respectful, responsible behaviors, staff need to solve the bullying problem, effectively support students who report victimization and model practices. In other words, staff closes the gap between their vision and the reality they face. When applied to learning how best to teach students with special needs, staff in inclusive schools relied on their colleagues' expertise and suggestions to effectively teach to student diversity. It can be argued that adaptive challenges puts pressure on the people with the problem to bear the weight and generate workable solutions.

Sullivan, Clearly, and Sullivan (2004) believe that the development of inclusive and safe schools comes from developing a culture that provides positive and enabling learning environments. This culture requires an attitudinal as well as a systemic change in order for each staff to work out how to do what they set out to accomplish. The success of the schools studied had similar features. Staff reached agreement on what needed to be done; staff worked out what support was needed; and staff helped each other through the process. Engaging all staff to help shifted the responsibility for solving the problem from the principal to the staff. An adaptive organization uses local expertise to solve local problems (Heifetz, 1994). School staff made their own decisions and solved problems using their tacit knowledge. This knowledge was specific to knowing what school staff needed and it was based on knowledge of the students, needs of the community and available resources. Any additional knowledge and skills needed to close the gap between the mission statement and reality were obtained when staff went to relevant conferences, workshops or read books.

In each of the four schools, decision-making was decentralized from central office. A decentralized system can produce intelligent and workable solutions to problems if there is a way of harnessing the ideas and expertise of everyone. Surowiecki's (2005) research on the wisdom of crowds found that, if a large enough and diverse group of people is asked them to make decisions affecting matters of general interest, that group's decision will over time be intellectually superior to that of any individual, no matter how smart or well informed that individual is. Under the right circumstances and with the right support, teachers in the four schools were remarkably intelligent as they were able to resolve the challenges without a lot of outside help. Teachers' collective intelligence became the most important ingredient to meet the challenge of adapting to an inclusive and safe school.

Bridging Policy to Practice

My interest in this study began with trying to identify the factors that connected successful policy implementation specific to inclusive schools with successful safe schools. The intent and purpose was to discover the similarities between inclusive education and safe and caring schools and find evidence of best practices in local schools. I discovered that efforts of staff at the school level were not directly informed by the respective written provincial or district policy statements. Staffs' response to the question on what the policy was that supported their practices included, "It is site-based. Not all schools are inclusive. This is the first school I've worked at that has embraced inclusive education." "We have pretty well gone to our own drummer and developed our own policies." "I do not know the policy. I just know that I work in a very caring environment." "[Policy] is a big fact binder stuffed in the office." Of all the responses to the questions addressed in this study, these responses were the most surprising given the reputation and quality of practices in each school.

I have a better understanding of the complexities and concerns contained in various provincial stakeholder reports that laid the initial groundwork for proposing this study, and these were highlighted in Chapter Two. Provincial or district policy statements by themselves were not known by staff interviewed. There was a disconnection between staff knowledge of the provincial or district's written policy statement and school staff understanding of the intent of the policy. Staff responses to the research question, what is the policy, were provided in relation to the school's practices and mission statement. However, not being able to state the provincial or district policy did not impede the success of staffs.

In the four schools studied, teachers were consulted and meaningfully involved in the school-based policy development and implementation. Responses to the question of what is policy included "We have developed our own policies," and "you have to have policy but need people to own it, value it or it won't work." Policy, in its design and implementation, was augmented by the actions of staff, and improvement in practices came about because staff developed the expertise needed to understand and achieve the intent of the policy.

It was not the policy itself that mattered. What mattered was the decision or ownership of each school to become more inclusive or safer schools. The success of the four schools has much to teach policymakers about the design and implementation of policy. The connecting factors between the two policy initiatives and my interpretation of them helped me to provide an explanation of how to realize not only more inclusive and safe schools, but what may be needed to bridge policy to best practices. The findings of this study support Fulcher's (1989) studies of successful policy implementation. What policy implementation turns out to be is what policy becomes. Teachers are policy makers. Effective policy tools were related to the school improvement process and staff's sense of confidence or self-efficacy.

Self-efficacy in policy implementation and receptivity to innovation were reflected in actions made by the school principals in this study. When implementing a new policy, it was common for school principals to begin by gathering information about the advantages and disadvantages related to a course of action. They assessed the reliability of the information and decided how to interpret and weigh it to inform their policy decisions at the school level. How this is done could have been influenced by the principal's sense of personal efficacy (Bandura, 1997). Effective leadership and receptivity to innovation in education require a high sense of efficacy in school principals who are motivated to achieve the goals of the system. Staff responses to the research question on supports that were needed for an inclusive or safe school included the supportive role of the principal or administration. "Administrative support is needed" and "you have to have the principal who has a vision and see the vision through" are examples of what staff viewed as an important support system. Based on these statements, the principals in the schools studied could be viewed as having a higher sense of self-efficacy, were supported by staff as a whole and, subsequently, were successful in implementing the respective policies. When faced with pressure and mixed support, Bandura's (1997) research also found that managers with low self-efficacy sought additional information, spent more time talking to others about the matter, and procrastinated longer in making decisions than managers with a high sense of self-efficacy. Principals with low self-efficacy were found to use the information gathered mostly for self-protection against innovation.

Each district's and school's education plan contained a plethora of varying initiatives expected by government. Examples included reduce class sizes, implement technology plan, implement daily physical education activities, implement a second language program, implement standards for special education and ensure schools are safe and caring. These initiatives were in addition to increasing student achievement. It could be argued that these different policies or initiatives should flow from a more consistent or coherent vision. Teachers expect many things from government but, at the very least, they expect what Pal (1997) calls "intelligent decision making" (p. 1) with respect to policies. It is difficult for staff in schools to build the necessary capacity to implement a policy, with integrity, if their efforts are continually pulled in different directions. Staff responses to the research questions indicated the challenges inherent in creating more inclusive or safe schools. For example, "Inclusion is difficult at times, if you are overloaded," and "I have been in schools where inclusion get started and then it gets blown off." This is important for effective policy implementation because teachers' support for a policy is filtered through their own histories, experiences, and values. Existing practices in schools compete with the interpretation of new policies (Fulcher, 1989). This may help explain why some policies are rejected, ignored or misunderstood (Ball, 1994). Of the thirteen schools visited for the purpose of this study, four were chosen based on the case study criteria and nine did not meet criteria. Some of the schools I visited for the purpose of this study did not meet criteria because staff was either not in agreement about the nature or extent of inclusive education or indicated student misbehaviours were a serious problem in their school. It can be argued that, when some schools are more inclusive than others or more safe and caring than others, the respective policy implementation could be viewed as a decision that can staff make and subsequently support. The words "first placement option considered" and "when appropriate" are included in Alberta's policy statement on educating students with special educational needs in inclusive settings (Alberta Education, 2004, p. 10). These words serve to imply a choice and the responsibility to comply with this directive can be easily displaced. If so, some students can remain excluded (Slee & Alan, 2005).

A policy's survival is contingent in part on an organization's capacity (Walker, 2005). Therefore, building capacity in schools is an important factor to bridge policy to practice. However, it is pointless to work on developing policy unless we know what best practice is. The findings from this study indicate the need for policymakers to base their decisions on a clear understanding of the results they wish to achieve and provide flexibility to schools on how to achieve the results. This would shift the focus of policy development away from the makers of policy to the users. It would also shift the focus on using policy as a means to influence attitudes and behaviours rather than an instrument to solve a problem. Backward mapping works out what the policy should be before it is executed. Policy should begin with a statement of beliefs or values and the specific behaviors reflected in those beliefs or values. Backward mapping works by beginning with the end in mind, identifying what the intended result or change would be, and then mapping the requirements at each level (Pal, 1997). Theory guides practice, but practices must add details that were never contemplated in the design of the original policy. By testing we learn, so a properly designed implementation process should provide a mechanism for policy feedback and improvement. Best practices should shape policy and policy should be influenced by these best practices. Top-down policy choices need to be met by bottom-up support to develop teacher capacity.

District administrative handbooks were also not known or referenced by staff in their responses to what the respective policy was. They were generally unaware of any district policy and "pretty well [had] gone to our own drummer." When policy was described by one staff member as "a big fat binder stuffed in the office," perhaps this is symptomatic of the need for compliance to policy over commitment. Hulley and Dier (2005) believe that policy and procedure manuals are developed to convey the rules and structures believed to be necessary if schools are to function effectively. The problem is that compliant following of rules results in a culture that stifles passion and creativity. Perhaps it was fortuitous that none of the staff participating in this study knew what the formal policy statements were. Had they known the contents of the school or district's policy manual, the focus might have been on identification, assessment, placement of students with special needs, components of individualized program plans, parent appeals, student conduct, order and discipline, and suspensions and expulsions. Instead, staff focused on the organizational and instructional practices that resulted in an inclusive and safe school. If district or provincial policy is to be more effective, perhaps it should include the necessary knowledge, skills, and practices needed for teachers to be successful. Once pedagogical support is written into a policy handbook, government and school districts would be compelled to provide the necessary supports for staff to implement the policy.

There must be leadership at the school level to transform the intent of policy into changes in practice and attitudes. School leadership was found to be an important factor in this study. Leaders in each school made a great difference for staff in this study. They understood the intents and purposes of their respective policies. They also encouraged and supported staff by delivering a coherent message provided in the form of a clear vision, which was the ultimate driving force for staff efforts. Too many staff interviewed considered policy to be something abstract, philosophical, and removed from the daily services and supports they provided. Bridging policy to practice involves the school staff becoming the public articulation of the school's vision and mission and, ultimately, bringing policy to a life.

If we are to teach students to learn respect and responsibility, the organization of schools ought to reflect this to its core. Whether or not a student who misbehaves or who is unable to learn at the same rate as his or her peers and that student is helped and supported, it reflects the school's commitment to modeling respect and responsibility for all students.

An inclusive, safe and caring school is proactive in ensuring an environment free from discrimination and provides a sense of belonging for every student. Staff finds ways of including students in the school rather than responding with traditional discipline methods or finding reasons to exclude some students. The fiduciary relationship between educators and students places a heavy burden on educators to help students respect and accept others who are different. Furthermore, educators bear the heavy burden of being entrusted with the important task of teaching all students Canada's democratic values in preparation for their participation as adults in the democratic community. Educators are charged with the responsibility of providing and promoting a positive, safe, and inclusive learning environment for every student who attends school. Teachers in this study proved they can take a proactive stance to create a culture of respect in our schools, where each individual is valued and treated with dignity. These best practices need to become policy.

Summary

This chapter provided a broader discussion of this study's findings. An inclusive, safe and caring school has more to do with school reform efforts and continuous improvement than a written policy statement. Efforts to reform or improve the schools in this study included staff leadership, adapting to challenges and rethinking the role of policy. The discussion of the findings suggests that the gap between policy and best practices should not be a wide as it currently is. What is concluded and recommended, as a result of the findings in this study, are presented in the next and final chapter.

Chapter 8

SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

Introduction

This final chapter provides a summary, the conclusions, and recommendations of this research study. My conclusions are primarily in the form of rethinking inclusion and school safety as a result of what I learned from conducting this study. Recommendations for practice and future research conclude this chapter along with a description of the limitations of this study.

Summary of Study

In this case study, four elementary schools were selected to compare what staff said and did that resulted in their school success with implementing policies specific to inclusive education and safe schools. The purpose of this study was to examine the policy factors that connected these two types of schools. Policies and practices were analyzed to determine if an inclusive school was also safe and caring and vice versa. The four schools in this study all provided both an inclusive school and a safe and caring school environment. It could be argued that, if a school is inclusive of students with special educational needs, it can also be safe and caring – and vice versa. In schools that were successful in providing an inclusive education and a safe and caring environment, school staffs owned their process and organized themselves accordingly. Influencing this theory is, what staff in successful schools say and do, individually and collectively, was a result of a common vision or moral purpose, reflected in staff collaboration; commitment, building pedagogical capacity and providing a school-based support system that led to positive outcomes for staff and students. The core variable that connected an inclusive with a safe and caring school was staff ownership of the process. It was not a result of a provincial or district policy. However, an inclusive school has a limiting component. A limitation is when a student's behavior is so disordered, a more intensive and supportive learning environment is needed.

Conclusions

Based on the findings in this study, the literature reviewed and my interpretation of both, some conclusions are made. The conclusions are intended for future research and future policy design and implementation. The conclusions will be of interest to school administrators who are interested in providing an inclusive, safe and caring school. In the process of generating this study's conclusions, I also found myself rethinking the concepts of policy development and rethinking what inclusion and school safety should be. The conclusions are presented, followed by my personal opinions on rethinking inclusion and safe schools, as both were informed by what I learned from the schools in this study.

The criteria for the selection of schools for this case study framed the findings of this study. School staff had to have three or more years experience with the inclusive or safe schools initiative. This assisted in staff being aware of the challenges and each staff was able to articulate their experiences and ideas. These experiences and ideas were collected in response to the interview questions. These responses were then used in the analysis of data, which resulted in generating the theory that connected inclusive schools with safe school polices.

Schools that provided an inclusive environment for students with special needs are also safe and caring environments. Once a school staff decided to become more inclusive or safe, this focus was aligned to the school's mission statement. Staff refined their instructional practices and organizational procedures and, subsequently, changed the culture of each school to better respond to the needs of students. In the process of change, staff attitudes became more inclusive as demonstrated in their relationships with students. Their commitment to inclusive and safe schools became based firmly in the principles of, and concern for, equality and acceptance of all students. The process was not an act of compliance with policy. Schools became more inclusive and safe because staff worked together to develop the knowledge and skills to support their goals.

Definitions and expectations need to be aligned to the overall mission or vision of the education system. Defining the vision or direction of efforts addresses where staff is going and what a school should look like. The vision should be clear enough for staff to act and become committed. The practice of improvement is the sharing of a set of proven practices and their collective deployment for a common end (Elmore, 2004). Elmore's (2004) studies on successful school reform efforts concluded that it is important to organize everyone's actions around an instructional focus until practices reach a high standard and staff internalize the expectations. The schools studied here improved because the staff agreed on what was worth achieving and set in motion the process by which staff learned how to do what they needed to do in order to achieve their goals. In other words, the "why" staff need to act comes before the "how."

There needs to be one definition that clearly describes the schools studied. Using Morrison et al.'s (2004) definition of a safe school, combining it with Ainscow's (1991) definition of an inclusive school and integrating the findings of this study, the definition of an inclusive, safe and caring school is a school that demonstrates physical, psychological, and developmental growth of all students by ensuring the full participation of students in school, curricula, cultures, and communities. A clear definition is a critical policy tool. Policy statements should begin with a statement affirming the value of student diversity rather than as a problem to solve (Consortium, 2001). A statement that values student diversity will help staff question what schools can do to become more inclusive and safe, and in particular, maximize the participation of all students in the culture, curriculum and community. Once an expectation is established, practices can be designed to meet the needs of the entire student population. The goal is to develop a sense of responsibility and ownership for all students. Implementing policy in the schools studied was affected by staff's understanding of what is intended and what is possible. With greater understanding, the deficiencies in practices gave rise to better practices. The ability of the schools to improve had to do with commitment and consistency of practices that supported the overall picture of what was expected.

Another conclusion is that policy statements must be clear and unambiguous. If policy statements are not clear or well articulated, then the policy could be seen as "unambiguous articulations of an unequivocal commitment" (Dyson & Millward, 2000, p. 158). Unclear or vague policy statements could permit administrators and teachers to choose whether a policy will be implemented. Policy has to be seen as the idealized representation of what should be, rather than a description of could be. Because government sets the policy framework in education, government should clearly articulate a coherent vision for schools and align every policy initiative to that vision. For each new policy created, it should be connected to a guiding framework so as to not be considered an island unto itself.

Policy should be designed for successful implementation. The findings of this study indicate that teachers had to develop the capacity to successfully implement the respective policy. Based on what staff said and did to create inclusive and safe schools, resources or supports were needed which were not provided with the release of each provincial policy. Policy design and implementation are unlikely to stimulate improvement in practices if they do not explicitly acknowledge the supports needed by experts in the field. Cohen and Barnes (1993) argued that, although policy in the form of a written directive is usually intended to convey information and intentions to teachers and administrators, the policies themselves seldom pay attention to what teachers and administrators have to learn and the supports needed to be successful with policy implementation. School staff needed time to collaborate. Staff needed additional expertise and assistants. Involving all staff and providing appropriate supports moved them from mere technicians of policy to owners of the policy implementation process. Ultimately policy is what happens behind the classroom door (Ainscow, 2000) and shifts in policy to improve school safety and increase access to regular education happen when there is an investment in building the capacity of staff.

School staffs were involved in the initial decision to provide more inclusive or safe and caring environments. Staff were provided professional development and support to increase their capacity to teach students with special needs in regular classrooms and respond to student behaviors. There was less reliance on outside expertise and more on using staff expertise. Through the use of professional learning communities, staff readily shared ideas, resources, and strategies. The challenges of change were sustained by staff because the leadership was shared. Teachers, administrators, and support staff worked collaboratively to meet the needs of all students, including students with special needs and behavior problems. These are the supports that teachers need to be successful with any policy implementation. This conclusion supports the importance of collaboration as a means of developing inclusive and safe schools. This raises the question of how school leaders can make use of the diversity of staff experiences and knowledge that exists in any given school for the successful implementation of policy.

The processes used by staff to become more inclusive and safe could be adapted or recommended for use in other public schools, because the idea of inclusive and safe schools is closer to school improvement efforts than other initiatives. The literature on school improvement has more in common with the findings of this study. No single model of school organization emerged from this study. A whole school approach did not imply a total overthrow of the organization and management structure of the school. Ainscow's (1999) features of a moving school are supported by the findings of this study. Each school in this study had: effective leadership spread throughout the school; involvement of staff, students and the community in school policies and decisions; a commitment to collaborative planning; attention to the practice of inquiry and reflection; and a policy for staff development that focused on pedagogy. Inclusive and safe schools were a result of staff improving the organization of school, process of planning and staff development. The development of such schools can be seen as the same as the process of school improvement.

The collaborative nature of the school cultures in this study has implications for school leaders. Strong leaders, committed to inclusive and safe school values are critical to the development of such schools. Leaders need to be committed to demonstrating the values of respect for student diversity and to providing equal educational opportunities for all students. Joint planning and collaboration are necessary to model such a philosophy. The use of professional learning communities provided evidence that inclusive and safe schools had become a school philosophy, rather than an add-on program, which created a unity of purpose. Collaborative teamwork was important to build the positive school culture and the ability for staff to share ideas, strategies and resources.

Inclusive and safe schools are a result of a continuous process. These are schools that are constantly improving and are not seen as having achieved the perfect state. In the process, staff continually analyze barriers to the success for all students. Ainscow (2007) calls this “school improvement with attitude.” (p. 129). The development of such schools did not emerge from a mechanical process in which specific organizational practices or particular programs increased success. Staff developed capacity and built consensus based on the responsiveness of the students to the changes. The process of including all students entails reducing the pressures to exclude some students.

The findings of this study present evidence that a readily available and cost-effective system is available to make schools inclusive, safer, and more caring. Laurier Lake, Maligne Lake and Lake Beauvert Schools provided examples of successful safe and caring schools. Patricia Lake School also met the criteria of a safe and caring school. Three of the schools studied had implemented the Effective Behaviour Support system (EBS). I reviewed the literature to determine what this system was and the source of its effectiveness. The simplicity of EBS made it attractive to the schools. EBS can be described as a school-based system that facilitates student behavior success (Walker, Horner, Sugai, Bullis, Sprague, & Bricker, 1996). The strategies inherent in this system are designed and implemented by school staff in all settings of a school with all students. EBS consists of a three-tiered behaviour system that incorporates a continuum of strategies at graduated levels of intensity. Universal strategies are the foundation of school-wide prevention efforts because they apply to the whole school population. Consistent use of these strategies by all staff provides sufficient support for most students, thereby preventing most behavior problems from occurring. Strategies include three to four positively stated behavior expectations, a consistent use of reinforcement and recognition, consistent set of consequences for not following the stated expectations, and basing decisions on data collected on student behavior. Universal instructional strategies include differentiated instruction and teaching social literacy and complement any behavior strategies. Selective strategies provide support for a small number of students who require additional supports to learn appropriate behaviors. Secondary prevention strategies include small-group instruction, social-skills training, mentoring and behavior contracting to avoid escalating behaviors or continued behavior problems. Targeted or individual strategies support a relatively small group of students who demonstrate significant behavior problems and require more intensive levels of support. Strategies for these students are often individualized and require additional adult support to achieve behavior management.

EBS has been found effective because classroom management and instructional practices are parallel processes: effective teaching of both academic and social skills involves direct instruction, positive reinforcement, modeling and pre-correction (Sugai, Kameenui, Horner, & Simons, 2000). Safran and Oswald's (2003) review of the literature on EBS found positive support and validation as an alternative to traditional discipline practices, particularly when a student's behavior is seen as the interaction between the school environment and the child. This review also found consistently positive results and schools can implement the system with minimal training and technical assistance from outside sources. Oswald, Safran, and Johanson (2005) studied the implementation of this behavior support system in a school and found large reductions in students' problematic behaviors. Leone, Mayer, Malmgren, and Meisel (2005) compared EBS with traditional discipline systems and concluded that the effective behavior support system identified policies, practices, or procedures in the school which supported or impeded appropriate behaviors.

EBS requires staff to buy into the process and work together to establish the procedures that fit their school's context and resources. There are clear guidelines for successful implementation and the strategies made it adaptable to each school based on its characteristics. These components add the promise of broad applicability, utility and sustainability (Sugai & Horner, 2002). Kern and Manz's (2004) review of EBS found that this system resulted in greater teamwork and collaboration, and resulted in greater staff reflection and self-evaluation. All these were evident in the schools in this study. Staff ownership of the process must be a goal if inclusive, safe and caring schools are the outcomes. However, without strong leadership, staff ownership, and commitment to the process, EBS could go by the wayside.

Recommendations for Practice

Based on the findings of this study, four major recommendations are presented to support successful policy implementation specific to inclusive, safe and caring schools.

Inclusive and safe schools must be considered as part of the mission or vision of a school. This study identified factors that connected the successful implementation of inclusive education and safe and caring schools. The factors identi[illegible] were based on the principles of, and concern for, equality and attending to the needs of all students in the social and educational life of the school. This was evidenced by staffs in each school studied. All efforts were aligned to the respective mission statements, and practices inconsistent with the mission were challenged. If this recommendation was to be realized, a culture of fairness, respect, and belonging would become an everyday part of every student's life in school.

The planning frame for rethinking inclusion and school safety must focus on examining why some students do not fit in, and enable staff to help all students to fit in. The focus for creating inclusive, safe and caring schools includes improving teaching practices. This would require changing the focus on the placement of students with disabilities or tracking incidents of bullying. Student difficulties in learning or behaving may be caused to some extent by the pathologies in how schools are organized or teachers are supported.

Teachers support inclusive education and safe schools. If inclusion and safe schools are to be fully realized, teachers need support. Successful practices came through sharing leadership, site-based decision-making, training and technical support. Collaboration provided the means to bridge the decision to effective practice. Resources were provided in the form of staff development, professional learning communities and regular meeting times. These kinds of supports are important for the implementation of any policy.

The latest research needs to influence changes to policy and practice. Decisions that influence policy and instructional practices need to be continually reviewed and updated to respect the latest research on best practices. We expect no less in the fields of medicine and engineering. Teachers need research to support their changes in practice and to have greater influence on their attitudes and beliefs.

Based on the above summary, conclusions and recommendations for practice, I found myself rethinking policy, inclusion and safe schools. The following thinking is based on my own personal reflections and opinions, albeit guided by the recent literature in each of the substantive areas.

Rethinking Policy

One of this study's findings was that school staffs interviewed were unable to articulate clearly the respective provincial policy, yet each school had successfully constructed best practices of what each policy should be. Staff referred to policy as what they did in relation to the school-based goal or vision. In this sense, school staffs are policymakers as they developed their own version of what an inclusive and safe school should be. If including all students with disabilities into regular classrooms and ensuring schools were safe and caring were a straightforward and a simple matter, policy would not be important. Policy is important. However, being able to articulate the wording of provincial or district policy statements were not that important to the majority of staff interviewed. This finding should not be interpreted as poor implementation of provincial policy. This would be misleading. This finding does raise the question of why some policies are selected for better implementation than others. Do some policies carry more power than others? Do school principals have more authority than they should in respect to choosing which policies to implement? The schools studied provided an idealized representation of what policy should look like in action. The staff in each of the four schools made great sense of policy based on my observations, interpretations of their responses and my knowledge of the literature. This finding led to examining how one should define policy and what policy is meant to be.

Dye's (1984) classic definition of policy is "whatever governments choose to do or not to do" (p. 1). Policy is also defined as a course of action or inaction chosen by public authorities to address a given problem (Pal, 1997). Policy is the instrument or tool to deal with issues of concern to the community (Pal, 1997). It can be seen as a way of dealing with problems. When Pal (1997) referred to policy, he defined it as "policy that deals with problems, not organizational routines or structures." He further argued that "policy comes from those who have the legitimate authority to impose guidelines for action" (p. 5). A common policy instrument is a written statement or goal to be achieved. It is the written statements specific to placement of students with special needs and the requirement to provide a safe and caring school environment that school staff could not clearly articulate. While government can develop policies, it is school staffs that enact them. The findings of this study support Fulcher's (1989) studies on policy. Policy is made at all levels and takes different forms. There are also many ways in which policy is constructed and interpreted. Decisions about moving to an inclusive and safe school were made through the planning and organization of the school environment. In short, policy was implemented through the process of school improvement.

If policy is what the government chooses to do or not do (Pal, 1997), then the same definition could include school staff choosing to implement a policy or not. Top down policy initiatives will fail to meet the expectations of policy makers if they fail to hold others accountable for the implementation. Policymakers should model what they want others to know and do instead. Teachers cannot escape policy, but they can extend it, rewrite it, and shape it to better fit the needs of their students.

Elmore's (2000) analogy of the reciprocal nature of leadership applies to the implementation of policy:

> My authority to require you to do something you might not otherwise do depends on my capacity to create the opportunity for you to learn how to do it and to educate me on the process of learning how to do it so that I become better at enabling you to do it the next time (p. 21),
>
> Policymakers can set the initial expectation and targets for practice but the closer that policy gets to the instructional core of teachers in the classroom, the more policy makers lose their advantage over knowledge and skill and the more policy makers should become more dependent on teachers to mold and shape that policy (p. 26).

Therefore, knowledge of policy should include best practices to be more effective for school-based implementation and policy success.

Since the introduction of the policy of placement of students with special needs into regular classroom in 1993, and a safe and caring school policy in 1999 in Alberta, one would expect a fairly high compliance with the policy, but this does not appear to be the case. Nine schools nominated for this study did not meet the criteria. Some schools have made progress, but others had not. This may suggest that written policy by itself is insufficient to promote significant change. It also may suggest how government views students with special needs or behavior problems. To illustrate, Stein (2004) investigated policies on poverty and analyzed the language and meaning used by policymakers. She found that policies provided frames for viewing the individuals they are designed to serve. If a policy is focused on students with disabilities or student conduct, rather than on the structural or organizational capacity, it contributes to seeing the policy's beneficiaries as problems. Students will continue to be seen as disabled or in need of discipline. Policy implementation relies on people's preferences or values (Pal, 1997). This leads to thinking about how policy can influence values directly or indirectly. Government has a key role in supporting and developing social values such as respect for individual differences and importance of responding to student diversity. How such values are stated contributes to the attainment of the values (Dunn, 1988). Such policies speak to attitudes in that they serve to change beliefs and behaviours.

Honig's (2007) analysis of policy implementation revealed that educational policy implementation was the product of the interactions between "people, places and policies" (p. 4). Those interested in improving the quality of educational policy implementation should focus on the demands specific polices place on implementers, the participants in implementation and their starting beliefs, knowledge, skills and the places or contexts that help shape what people can and will do. The interactions between people, places and policies can help explain what works, for whom, where, when and why. Supports provided to staff need to be varied depending on what staff already know and can do. This implies that one size does not fit all when it comes to implementing educational policies. Implementation of policy involves a process of sense-making that reveals the existing knowledge base, prior understanding and beliefs about the best course of action (McLaughlin, 2007). This implies that policy implementation is a result of the development of knowledge and beliefs.

School improvement as a result of policy implementation is a developmental process, not an act of compliance with policy (Elmore, 2004). Schools got better by engaging collectively in the acquisition of new knowledge and skills, not by figuring out what policy makers wanted. The development of the knowledge and skills was a cumulative process of making sense of the policy's goal. The process can be characterized by initial gains in knowledge, performance followed by situations in which staff did not have the knowledge or skills to effectively respond and this led to the next level of knowledge and skills. The strength of staff skills and knowledge influenced the degree to which they were able to change practices. Elmore's (2000) studies on school reform efforts found that policy can set the initial expectation but the closer policy gets to the instructional core or teachers in the classroom, the more policy makers lose their advantage over the knowledge and skills needed for the policy's success. Policy-makers need to rely on teachers to mold and shape policy in ways that respect the conditions and constraints of schools and classrooms.

Spillane, Reiser, and Reimer (2002) argued that what a policy means is based on the interactions of existing cognitive structures (i.e., knowledge, beliefs and attitudes), the situation and the policy goal. It is important that teachers make sense of policy, thereby helping them to develop better understanding of the intent and purpose of the policy. Analyzing practices that support or present barriers to policy implementation is inherent in the process of sense-making. Spillane, Reiser, and Gomez (2007) furthered argued that cognition is an essential lens for understanding educational policy implementation, especially the implementation of policies that demand significant shifts in teachers' practices. The "what" of policy begins with the policy text, such as a written directive or statement. Individuals must use prior knowledge and experience to notice, make sense of, interpret and react to incoming stimuli, all the while constructing meaning from their interactions with the context of which the policy is part. The fundamental nature of sense-making is that new information is interpreted in light of what is already understood. It is important to provide supports and resources for policy implementation because most implementers of policy are novices. Few people are experts when policy charts new terrain. Professional development, consultants, meetings, materials and informal interactions help teachers to make sense of policy influence a policy's success.

A well-designed policy with fidelity of implementation is, by definition, a good idea well implemented (Pal, 1997). When comparing policies on inclusion with safe schools, it was easy to conclude that they were of equal value because of the indicators of success. This raises the question of whether some policies can have a ripple effect on the implementation of others. Like a stone thrown into water, the ripples that come from the point of impact spread out. Were these schools successful because they were successful in implementing other policies? Were these schools successful because one policy had greater relevance at a given point in time than another? For example, Maligne Lake and Patricia Lake Schools began with implementing an inclusive education policy, moved to a safe-school policy, and are now in the process of implementing an assessment for learning policy. Perhaps it is not the subject of the policy that matters but the success of the process used in former policy implementation. In each case, the successful implementation of each policy served as a starting point for the next. Perhaps the challenges faced in each school at a given time had greater consequences for choosing one policy over another. Appropriating policy may be contingent on the degree of perceived congruence between the policy directive and local priorities, the starting capacity of staff and the amount of effort required. In each school studied, a local leader made a case to staff then sold staff on a preferred approach. Once the approach was selected as the solution, training and resources were directed to that approach. It was not feasible for staff to do everything at once. The school leaders in each of the schools studied were able to connect policy implementation to local initiatives and school priorities.

Successful implementation of a policy was also based on staff harnessing resources to get the job done. The general steps included: selecting the desired goal consistent with the school's vision or mission statement; examining possible routes to achieving the desired goal; developing the knowledge and skills in the most efficient manner possible; aligning resources to achieve the goal; using strategies consistent with achieving the policy goal; and monitoring impact of efforts. Torjman (2005) asserts that policy implementation represents a decision and the selection of choices about the most appropriate means to the desired end. In the schools studied, professional learning communities were crucial to supporting staff. Coburn and Stein (2007) view policy implementation as a process of learning that involves the gradual transformation of practice via the ongoing negotiation of meaning among staff. This process depends on the communities of practice in schools and the practices which emerge from policy. At the end of the day, the formulation of policy involves the process of making good decisions for the public good. Policy implementation is a social learning process that results in communities of practice.

Rethinking policy should include reducing the range of policies directed to school staff. Too many directives compete for scare resources and staff knowledge to effectively implement them all. We need to begin by reducing the number of polices that can be implemented at any given time. Then we need to focus on implementing one policy well enough to have the greatest ripple effect on the next policy that will follow. Rethinking policy involves bringing coherence to the process and aligning all policies with one common vision or mission that truly includes all students. Ultimately, we need to rethink what it takes to respect and accept all students. This thinking requires a more inclusive design and alignment of policies to best practices.

Rethinking Inclusion

Although some schools and districts provide an inclusive environment for students with special needs, this is the exception, not the general rule in Alberta schools. Rethinking inclusion begins with the authority schools have to enact policy and ends with how inclusion has been conceptualized within the field of special education.

The provincial stakeholder reports highlighted in Chapter Two reveal a certain indignation by teachers and school trustees about the progress, or lack thereof, in local schools, due to lack of support for teachers. Each of the schools in this study had the same access to supports as any other school. The difference was in how the staff were supported in their efforts, adapted to challenges and drove the change process from the inside. The inclusive schools in this study match what Ainscow (1999) identifies as the conditions for effective schools. The conditions of effective schools are: effective leadership distributed throughout the school; involvement of staff and students in developing policies and making decisions; a commitment to collaborative planning; a commitment to reflection and practice of inquiry; and staff development that focuses on improving classroom practices. These conditions are the same as those found by the OECD's (1999) international study on inclusive education, and Dyson, Howes, and Roberts' (2002) identification of effectiveness of school-based actions for promoting the participation of all students.

Alberta schools have discretionary authority to enact policy and operate with minimal interference from government. This also has the potential to undermine the progress of inclusive education. At present, local school practices are diverse and schools have too much local autonomy, which can give schools the power to exclude students with learning or behavior problems. Gartner and Kerzner-Lipsky (2000) argued that adopting an inclusive school philosophy should not depend on teachers' preferences and how they feel about doing it. Connor and Ferri (2007) examined teacher resistance to inclusion of students with disabilities into the mainstream over the past three decades. They found that special education has become a way of keeping the peace by removing students who might disrupt the status quo of general education. When students are routinely removed from classrooms to receive instruction elsewhere, the classroom teacher is released from the responsibility of learning how to teach not only these students, but all future students with similar needs. Supporting the removal of some students decreases the capacity of teachers to team to effectively respond to student diversity. Rethinking inclusion means that general education must assume responsibility for inclusion if such policy is to be fully realized.

Inclusion, as evidenced in the schools studied, is a way of thinking and acting that results in both staff and students feeling accepted and valued. Inclusive practices should remove barriers to learning (Booth & Ainscow, 1998) and challenge prevailing attitudes and policies that exclude some students and not other students. Our education system must be structured so as to accommodate and respond to student diversity to the point of undue achievement. We need to be committed to ensuring all students are supported in their learning and teachers are supported in their teaching. Inclusion needs to become the responsibility of regular educators. Inclusive schools will not be achieved by transplanting special education thinking into the mainstream.

Many prominent researchers (e.g., Ainscow, 1991; Dyson, 2000; Fulcher, 1989; Stein, 2004) have publicly criticized the deficit model governing eligibility for special education supports and services. The current system of determining eligibility for special education in Alberta is based on a funding allocation model that promoted "coding" students with a special educational code. At this time, there are 18 different special education codes, each with differing criteria. Eligibility for special education is a result of an assessment of a student's limitations and deficits. This process includes the following: complete a psycho-educational assessment; assign a special education code; qualify for additional funding; access services or supports; and develop an Individualized Program Plan (IPP). Once a code is assigned to a student, the student is to receive additional supports and services. The provincial monitoring process experienced by school districts includes ensuring compliance to the special education coding process by keeping an updated assessment on file, identifying at least three out of five supports, and developing an IPP. This process does not determine whether learning is occurring or student are benefiting from supports.

This study found that school staff focused primarily on the organization of the school as a whole. Lack of progress in individual children was attributed to the need for a re-organization of that school or practices which did not benefit all children equally. Ainscow (2000) argued that the definition of inclusion should be a process of "increasing the participation of students in and reducing their exclusion from school, curricula, cultures and communities" (p. 109). The findings from this case study support this definition. Inclusion is not about putting special education into regular education (Lilly, 2000). It is about creating a better system of education that works well for all students, including students who are disabled. To create such a system would require a shift from the current emphasis on assessing students for special education eligibility to focusing on removing organizational barriers to learning.

It is common for students with special needs in Alberta to be referred to as a "coded student" such as "He is Code 42." The use of these codes has taken on a language of their own and defines who these students are. Codes have become stigmatizing to the very population these codes were intended to serve. Fulcher (1989) argued that the term "special educational need" establishes a categorical status signifying deficit and failure in students and this directs attention away from the problems in teaching and the organization of schools and their resources. Kunc (2000) argued that adherence to current paradigms in special education has resulted in segregated programs that focus on a perpetual preparation for life and repairing people with disabilities. Students who are "coded" are not expected to be on grade-level curriculum or participate in provincial tests. Therefore, it can be argued that the special education coding criteria condone expectations for low achievement of some students. As long as the coding criteria continue to be based on the provincial special education definitions, and not based on what is needed to achieve the outcomes of the programs of study, expectations and achievement will continue to be lowered for these students.

Presently, in order to receive additional funding, schools have to assess, identify, and label children as students with special needs using a special education code. As long as special funding is primarily based on low scores on standardized tests or how badly a child can misbehave, school administrators will continue to code students as an attempt to access additional funding. Many of the formal assessments used to identify students with special needs do not provide sufficient information to support instructional decision-making. Ysseldyke (1986) argued that the requirement to first assess and identify a student's disability before resources can be allocated distracts attention away from the central issue of how best to teach all children. What is perverse about the current special education funding structure is that it rewards school districts for low performance or bad behaviors in students. Kunc (2000) presented the current system as a "catch 22" whereby students with disabilities cannot belong in regular education until they learn, but they cannot learn, because they are prevented from belonging. The injustice is that some students are viewed as typical and others in need of repair. The unfortunate truth is that students with disabilities have been subjected to different expectations, and their entrance into regular classrooms has been conditional on their ability to learn or behave like all other children do.

The learner deficit view of special education is deeply entrenched in the current special education system in Alberta. The debate over the need for coding could become polarized between those who endorse the coding process as necessary for accessing additional funding and those who advocate for system improvement to provide quality learning opportunities for all students. Another process is needed to ensure that special educational needs are not caused by the limitations and deficits of the educational system to accommodate student diversity and effectively teach all students. This process should include: focus on the mission of the school/district; analyse the results of student achievement; develop an action plan for improvement, provide staff development; and organize supports to meet the needs of all students. The schools in this case study followed the latter process. The greater challenge is to seek continuous improvement of our schools and respond to student diversity without taking away hard-won constitutional rights to be treated differently because of a special educational need.

Staffs in this study's schools practiced respectful compliance to the categorization and identification of students with special needs, a provincial and district policy requirement. However, students were never verbally referred to as "coded" students, so as to indicate their status as eligible for special education supports or services. Additional funding that was received by the schools was used to support the students and staff. Educational decisions and supports were based on how best to achieve the mission or vision of the school to benefit all students equally. This supports Stein's (2004) recommendation that we need a relentless focus on what effective instruction should be, and supports Ysseldyke's (1986) argument to make teaching and pedagogy central to the work of schools. We need to do whatever is necessary to find out how to teach all students equally well and leverage all resources to benefit learning. Kunc (2000) presents educators with a choice. They can either continue to blame students for lack of progress on the basis of their disability, or they can have the courage and integrity to question seriously whether there is a more effective way to prepare students.

Inclusive education is not based on importing special education practices into regular education or the simple placement of students with special needs into regular classrooms. There is no compelling evidence in the literature that placement is a critical factor in students' social and academic success (Villa & Thousand, 2000). This practice has served to deflect attention away from more significant issues that are preventing all students from learning. Ainscow (2002) argued that we need to move from the individual program planning approach to learning how to effectively teach to student diversity. The challenge is to design schools that respond to diversity without taking away hard-won constitutional rights for students to be treated differently. The greater challenge is to move away from labels or special education codes and move towards regular education as being special for all students.

If Alberta's public education system is founded on a commitment to educate all children well, then it is essential that schools foster and support the intellectual, social, physical, emotional, and spiritual development of each child, including students with special educational needs. Current policies for special education in Alberta should be linked and integrally related to the overall efforts to improve student achievement. Future efforts must focus on developing ways to gather data on the performance of all students with special needs, to determine what works, what does not and why. The provincial accountability system should be modified to provide information that will improve both the teaching and learning of students with special needs. Accountability in education involves analyzing the results of student learning for the purpose of identifying areas of growth and program improvement.

Rethinking inclusion starts with a value system that involves nurturing and providing a sense of belonging to all students regardless of their differences in culture, sex, race, ability, or language. It also involves organizing supports to meet the needs of all students. Ensuring that all students are equally supported by the mission of the education system sends a strong message to school staffs, parents and students. The Department of Education could begin with an equal emphasis on achieving the mission of the education system for all students. When "all" really means "all," teacher knowledge and skills are developed to make it possible for all students to achieve higher standards. This emphasis requires a greater knowledge of effective interventions and strategies and closing the gap between regular and special education. Rethinking inclusion requires focusing on whole-school approaches to prevent learning difficulties through examining and removing barriers to learning, curriculum and programs for every student. Rethinking inclusion also means schools need to be supported to take positive steps to ensure students with special education needs equally benefit from the education program offered to all students.

Rethinking School Safety

It is the responsibility of all school boards in Alberta to ensure that each student enrolled in a school operated by the board is provided a safe and caring environment that fosters and maintains respectful, responsible behaviors. Yet, the policy documents, reviewed for the purpose of this case study typically focused on the process of suspending and expelling students to promote safe schools. School staff are not receiving a coherent message. Schools and school districts have the same flexibility, autonomy, and choice in how to make a school safer as they do to make schools more inclusive of students with special needs. Each of the schools in this study had the same access to resources as any other school. Like inclusive schools, the difference to creating safe and caring schools was in how the staff adapted their own way forward and drove the process from the inside.

Systemic failure occurs when the positive effect on some students is possible only through the negative effect on others. Excluding students with severe forms of behavior disorders from an education is no more moral than forcing the most critically ill patients away from an emergency room (Brendtro & Long, 1995). Rethinking school safety involves helping schools adopt and sustain practices that demonstrate their effectiveness on a school-wide basis. Suspensions, expulsions, name tags, security checks, and video surveillance are becoming more common measures to ensure school safety. These quick fixes have not resulted in schools becoming safer or more inclusive. When students are removed from school or encouraged to drop out, they suffer from an incomplete education, often accepting the blame and economic deprivation associated with academic failure, as their own.

The irony, explains Ross-Epp (1996), is that, when the student who is compelled to attend school is failed by the system, it is the student who accepts responsibility for the institution's failure.

Rethinking school safety also starts with a value system that includes nurturing and providing a sense of belonging to all students regardless of their differences in culture, sex, race, ability, or language. It also involves teaching respect and modeling responsible behaviours in an effort to achieve a school's mission statement and beliefs. EBS was supported by this study and the literature as an effective means to ensure each school provides a safe and caring environment that fosters and maintains respectful, responsible behaviours.

For many youth, the only sense of community is what they are provided at school. If the school environment does not foster growth in respectful, responsible behaviors, how can our youth be successful? Schools are a major socializing agent. Careful planning and comprehensive practices are necessary and should create a culture of respect in schools whereby every individual is valued and treated with dignity. Roher's (2003) review of the Ontario laws as they apply to special education and safe schools emphasizes the importance of developing a positive school climate, where caring and respect are valued and practiced by all staff and students. Creating a positive school environment serves to honor our legal responsibilities as well as our professional and moral obligations. Our young people need to be guaranteed that their learning environment will support them in making intellectual, moral, and emotional progress. The Effective Behaviour Support system is effective in practice and in research and should be considered the primary vehicle to support all schools to be safe and caring.

Recommendations for Future Research

Recommendations for future research on inclusive, safe and caring schools are limited to four areas. First, the connecting factors identified from this study should be taken and applied to a school that is not yet fully inclusive or safe. The results of such action research would contribute to verifying the findings. Second, more research is needed on how school staff can increase the participation of all students in the culture, curriculum, and community of schools in order to support the intent and purpose of the respective policies. Inclusive and safe schools must be about what is possible in ordinary circumstances in typical schools, not what is possible with extraordinary resources or exceptional teachers, however important these may be. The restructuring of a school culture, policy and practice are features of the schools studied. This begs the question for further study. When faced with student diversity, what precisely are the cultures, practices and policies that are to be developed in order to maximize the participation of all students in the culture, curriculum and community? The review of the literature related to this study was mixed and inconclusive as different definitions were used. Third, this study should be extended to examining best practices in secondary schools. This study focused on four elementary schools. Finally, future research should be conducted on the effects of dismantling the typical structures of special education and the current categorization system that classifies students with special needs. This study focused in part on students who were categorized as having special educational needs. This research could be focused on ensuring equal educational opportunities are provided for all students. It makes little sense to foster inclusive and safe schools based on certain categories of students or behaviours. Students who are English language learners or from different cultures need to also be considered. Such research would support staffs' efforts to determine exactly what policies or practices maximize the full participation of all students in the culture, curriculum, and school community. This would be important, especially for those in leadership positions, to find more effective ways to reduce the need for special education placements, reduce disciplinary exclusions of students and openly welcome students and families from differing cultures.

Given the fact that only four elementary schools were included in this study, the findings should not be generalized to all schools. The four schools were chosen for study because they met the criteria that shaped this study. They were purposively selected out of the schools nominated and visited and, therefore, are not representative of all public schools. The relationship between the inclusiveness or safety of a school and the actual achievement of students with special educational needs is unknown. Further research is needed on the outcomes for students, that is, the effect school's policies and practices on how increasing achievement. This case study was conducted at a certain point in time. Many practices in the schools were in process during that time of data collection which was during the 2004 and 2005 school years. This limits complete duplication of this study. Finally, this study did not provide a comparison with schools that were not inclusive or safe and caring.

This limits the study to the similarities, not the differences, between inclusive and safe schools at the elementary level.

Summary

The purpose of this study was to investigate the factors that connected successful implementation of policy specific to inclusive education and safe schools. The relationship between inclusive education and safe schools was found to be reflective of school improvement efforts. In particular, I wished to know what school staff said and did that resulted in their success. For this reason, a case study design was adopted. Four schools were studied in order to compare the features of inclusive schools and safe schools. The findings were the identification of factors that connected both types of schools. Both schools had a common vision, commitment to the process, high rates of collaboration, built pedagogical capacity, and subsequently developed an inclusive and safe culture. The core variable was identified as staff ownership of the policy implementation process and organizing themselves accordingly. Literature was found to support the findings on the connecting factors. These factors were further analyzed and found to be related to sharing the leadership, adapting to challenges and linking policy to best practice.

Schools that were inclusive of students with special needs also provided a safe school environment for all students. An exception was found with one school's ability to successfully include a student with severe behavior disorders. In this case, a separate, more intensive and supportive program was needed. Further, it was found that provincial policy had the least direct effect on best practices in each of the schools studied.

Having convincing research and having it influence policy and practice are two very different matters. A great deal of work remains to be done to achieve the intended goal of using research to influence public policy and practice. It is hoped that this study is meaningful to teachers, school administrators, and policymakers and the field of special education, policy studies, and educational leadership. The people who participated in this study were teachers, teaching assistants, principals, and one police officer. It is hoped that this study has meaning for them because they shared their experiences and successes, and being chosen to be included in this study brings worth to their work and value to their efforts.

EPILOGUE

I did not know what I would find when I started this study, and I did not expect to find what I did as a result of this study. There is no recipe for success, but there are important ingredients that result in schools becoming inclusive and safe for all students. One test of decent research and analysis is whether it is topical at the time it is written and yet remains useful when times have changed (Elmore, 2004). The difficulty with conducting good research is not with getting started, it is with finishing. In the elusive search for the "right answer," the more I read, the more I was directed elsewhere. The more I went elsewhere, the more I realized that there is no end to what is the right answer. Michelangelo is often quoted as having said that inside every block of stone or marble dwells a beautiful statue; one need only remove the excess material to reveal the work of art within. If I were able to apply this visionary concept to inclusive and safe schools, teachers' energy should be focused on chipping away at the stone or the barriers that prevent every child from learning and belonging in our schools.

This study would not have been possible without the patience, tolerance, and openness of staff and principals in the four schools used for this case study. Their willingness to accept my presence and engage in a conversation was an indication of their commitment to students and to their professionalism. Everyone was supportive and as helpful as they could be. This made me realize that their kind of enthusiasm and collegiality are exactly what it takes to achieve the goal of inclusive, safe, and caring education for all students.

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APPENDICES

Appendix A

SAMPLE CORRESPONDENCE

Superintendent of Schools
St. Albert Protestant Separate School District #6
60 Sir Winston Churchill Avenue
St. Albert, AB.
T8N 0G4

June 2003

Dear Superintendent of Schools:

RE: Inclusive and Safe and Caring Schools Research Study

I am currently a doctoral student in the Department of Educational Policy Studies, Faculty of Education at the University of Alberta. My research is focusing on the factors that result in schools being inclusive *and* safe and caring for students and to influence future public policy.

I am hoping to interview and observe school staff in two types of schools – schools that have a reputation for being inclusive of students with special needs and schools that have a reputation for providing a safe and caring school environment. If you believe that you have a school with such a reputation, I would appreciate having the opportunity to visit the school and talk to the school principal. This school visit would allow me to determine whether the school should be part of more in-depth research to determine exactly what teachers say and do to provide an inclusive environment or a safe and caring school environment.

Attached is information related to the nature of the research study. Included are two packages for prospective principals of either an inclusive school or a safe and caring school. Each package contains a cover letter for the school principal, summary of the research study, consent to participate in research study, an interview and observation schedule, and the interview guide. Please feel free to share this with respective principals who may benefit from participating in the study.

If you have any further questions about the study as proposed, please contact myself by calling Mayfield School (780) 489-5100 ext. 307 or my home (780) 434-8418 or by e-mail: bsautner@epsb.ca You may also contact Dr. Frank Peters, my research advisor with the Faculty of Education by calling (780) 492-7607 e-mailing: frank.peters@ualberta.ca

I look forward to hearing from you and the possibility of visiting schools in your school district.

Sincerely,
Brenda Sautner

Appendix B

INTERVIEW GUIDE

Staff Name: Years Teaching: Position: Training:

Research Question	Interview Question
How do teachers and school administrators define a safe and caring/inclusive school?	How do you define a safe and caring/inclusive school?
What does a safe and caring/inclusive school mean in practice?	How does a safe and caring/inclusive school environment look in practice?
What do teachers say and do that result in students feeling "safe," and "cared for" / "included" in classrooms and/or schools? What would you recommend to other school staff?	In what ways do you demonstrate safe and caring /inclusive values? What would you recommend for other staff?
What supports are needed for teachers to provide a safe and caring/inclusive school environment for all students? What is the most effective use of additional supports?	What supports are needed for your school to provide a safe and caring/inclusive environment? How can staff use additional supports effectively?
What knowledge do school administrators and teachers have about policies related to safe and caring/inclusive schools? What should future policy be?	What is the provincial, district and/or school policy on safe and caring//inclusive schools? Do you have any recommendations for future policy directives?
How do teachers define success with safe and caring//inclusive school environments?	How do you know when you are successful? What are the indicators for a safe and caring/ inclusive school environment?
	Other Questions?

Appendix C

SUMMARY OF RESEARCH STUDY

SUPPORTING INCLUSIVE, SAFE, AND CARING SCHOOLS: CONNECTING FACTORS

Purpose of Study

The issues of school violence and inclusive education have recently generated serious study across Canada. The Government of Alberta has developed policy statements and directives to school boards to consider the regular classroom in regular classrooms in neighbourhood schools for educating students with special needs and to ensure that every student is provided a safe and caring environment that fosters and maintains respectful and responsible behaviors.

This study is designed to identify the connecting factors that result in schools providing inclusive education and safe and caring environments as part of the requirements for the Doctor of Philosophy in Educational Administration at the University of Alberta. The research will be specifically focused on how school administrators and teachers create and maintain school environments that are inclusive, safe and caring for all students. To date, there is no literature available that achieves this purpose.

Benefits of Study

The practical realities of implementing government policies in times of increased demands on teachers and within the current fiscal constraints often inhibit the successful implementation of any new initiative. Various provincial reports and task forces however, indicate general support for inclusive education and the safe and caring school initiative. School staffs have also indicated pockets of success in their efforts. The benefits of this study include gathering teachers' experiences and expertise in their successful implementation and identifying the connecting factors for future practice public policy. If teachers are able to implement two initiatives using the same policy or set of practices, this research serves to increase their efficiency and effectiveness in achieving two important initiatives simultaneously.

Research Methodology

The main data will be collected through personal interviews with school staff in four local schools, observations of the staff in their classrooms and a review of the literature.

Data Collection Procedures

The procedures for collecting data will be systematic and sequential. The researcher will visit schools that have been recommended. Should a school be selected for more in-depth study, permission to participate must be granted by each individual staff member, interview times arranged and conducted in ways that are convenient to both parties. Interviews will be taped using audiotapes, transcribed and participants will be asked to verify the transcript. Classroom observations will then be conducted of each participant and the observation notes verified by the observed. Finally, the literature will be reviewed for relevant finding as the data is analyzed, with the overall goal of identifying relevant themes or factors.

Your participation will limited to:

- Providing your written consent to participate in the study
- Personal interview for about one hour for you to provide confidential responses to the interview questions
- Being observed within the context of your school and classroom on two or more occasions as you work with students and other staff members
- Providing your feedback on the transcribed interview responses and observations as you work with students and other staff members
- Asking any questions that you may have as a result of your participation in this study
- Being provided a summary copy of the final research report, if requested.

Right to Opt Out

Your participation in this study is voluntary. Therefore you have the right to withdraw from the study at any time for any reason without harm or prejudice. Should you wish to opt out, please contact the principal researcher or advisor as soon as possible.

Anonymity and Confidentiality

All research will be conducted according to the policies, ethical standards and guidelines approved by Graduate Studies and Research, University of Alberta. Copies of such policies, standards and guidelines can be provided upon request. You, your school and school jurisdiction will be assured anonymity throughout the research process and in the reporting of any findings. Data collected will be kept secure and confidential at all times.

Researcher Contact Information

Principal Researcher:
Brenda Sautner, Provisional Candidate, Doctor of Philosophy
Telephone: (403) 342-3715 or 887-0555
E-mail: bsautner@rdpsd.ab.ca or bsautner@shaw.ca

Research Advisor:
Dr. Frank Peters, Professor, Faculty of Education, University of Alberta,
Telephone: (780) 492-7607
E-mail: frank.peters@ualberta.ca

Appendix D

INTERVIEW & OBSERVATION SCHEDULE

- ☐ Obtain all necessary permission to proceed with research study from advisor
- ☐ Contact school jurisdiction's central office to discuss research study, potential involvement of schools and obtain recommendations for schools to be considered
- ☐ Contact school principal to discuss research study, recommendation of central office of the success of school staffs' implementation efforts, criteria for schools participating in the study, obtain information for possible involvement of staff and additional information on suitability of involving school staff for research purposes
- ☐ Select school based on meeting criteria for selection and reputation for successful implementation efforts
- ☐ Forward names of schools selected with background information to school principal and provide copy of all correspondence to central office contact person
- ☐ Obtain name(s) of school's key contacts and school daily schedule
- ☐ Obtain demographic information, including student population, number of students identified with a special need, identify programs currently in place and lead teachers
- ☐ Request written copies of school and jurisdiction policies, manuals and any other document relevant to the study
- ☐ Arrange time to meet with principal to review purpose of study and requirements of participants and meet with staff to provide same information, if requested
- ☐ Establish timeframes, including dates and daily schedules for interviewing and observing teachers and school administrators, for staff feedback and approval
- ☐ Arrange for a private location within the school to conduct interviews and ensure equipment is in proper working order
- ☐ Arrange for interview responses to be transcribed as soon as possible following each interview
- ☐ Arrange times to observe staff as the follow up to their interviews
- ☐ Arrange a time to personally record observation notes, field notes and any other information relevant to the study while in the school to capture the essence and accuracy of the information as it presents itself.
- ☐ Be available to answer questions of staff, students, parents and members of the community
- ☐ Arrange a convenient way to have each participant review the transcripts and observation notes to ensure accuracy, verify contents, provide additional clarification or make modifications
- ☐ Obtain names and mailing addresses of individuals who request a copy of the summary report of research findings
- ☐ Other____

Appendix E

CONSENT TO PARTICIPATE IN RESEARCH STUDY

Supporting Inclusive, Safe, and Caring Schools: Connecting Factors
by Brenda Sautner, Ph. D Candidate, University of Alberta

Dear Colleague:
In response to your willingness to volunteer to participate in the research study, Supporting Inclusive, Safe and Caring Schools: Connecting Factors, the following will be required:

- Providing your written consent to participate in the study
- Conducting a personal interview for about one hour for you to provide confidential responses to the interview questions provided
- Observing you within the context of your school and classroom on two or more occasions as you work with students and other staff members
- Providing your feedback on the transcribed interview responses and observations as you work with students and other staff members
- Asking any questions that you may have as a result of your participation in this study
- Requesting a summary copy of the final research report.

You can be assured that all information collected will be kept secure, private and confidential. Your name, school and school jurisdiction will remain anonymous. As a volunteer, you can opt out at any time without harm or prejudice. The results of this study will be used for identify the factors that make our schools both inclusive and safe and caring at the same time. Recommendations will be made for future practice and policy.

Please sign below and return in the stamped addressed envelope. It you have any questions please contact Brenda Sautner at (403) 352-3715 or bsautner@shaw.ca

INDIVIDUAL CONSENT TO PARTICIPATE IN RESEARCH STUDY

I ______________________________ consent to participating in the research study
(Print your first and last name)

as outlined. I am aware that this research is being conducted as partial fulfillment for the requirements of the Doctor of Philosophy in Educational Administration and Leadership. My participation and information provided will be kept confidential and my anonymity will be respected.

Signed ____________________________ Date ____________________________

Curriculum Vitae

Professional Accomplishments to Date

Leadership

- Assistant Superintendent, Intervention Services, 2004 - present
- Doctorate of Philosophy - Candidate, 2000 - 2008
- Assistant/Acting Principal, Mayfield School, 1994 - 2000
- Safe and Caring Schools/Behaviour Consultant, 1999 – present
- Minister of Learning's Safe & Caring Schools Initiative First Provincial Coordinator, 1995 – 1999
- ATA Special Education Council Executive Member, 1992 – 1997

Author

- The Coding Conundrum: Is it Time to Uncode Special Education? Alberta Teachers; Association Special Education Council, 2007
- Safe & Caring Schools (Guest Editor, Special Edition), Reclaiming Children and Youth, 2001
- Guide to the Best Educational Programs & Practices for Students with Severe Behaviour Disorders, The Alberta Teachers' Association, 2000
- General, Special & Inclusive Education: Can We Have It All? Canadian Association for the Practical Study of Law in Education, 1999.
- Violence in Schools: Shedding New Light on the Matter, Canadian Association for the Practical Study of Law in Education, 1998.
- Position Papers: Inclusive Education (1998), Funding of Special Education (1997); Accountability in Special Education (2004), The Alberta Teachers' Association.

Recipient

- Fellowship Award and Research Initiative, Canadian Association for the Practical Study of Law in Education, 2005
- Julius Buski Leadership Award, Council on School Administration, 2003
- Murray Jampolsky Scholarship, Alberta Teachers' Association, 2000
- Educational Trust Project Award, Alberta Teachers' Association, 1999
- Award of Excellence, Honourable Mention, Safe and Caring Schools, Premier of Alberta, 1999
- Award of Excellence, Special Education in Alberta, Premier of Alberta, 1996
- Edwin Parr Teacher of the Year Award, Zone 2, Alberta School Boards Association, 1987

Employment History

2004 - present **Assistant Superintendent, Intervention Services, Red Deer Public School District**

- Supervision of special education, guidance and counselling services
- Coordination of English as Second Language, Gifted & Talented Programs and Pre-Kindergarten
- District Liaison to Board, Senior Administration Department and Zone Four Special Education Committees
- Policies, Procedures and Regulations for Special Education, Guidance & Counselling and Coordination of Services
- Student eligibility, placement and District Special Education Programs

2000 – 2004 **Assistant/Acting Principal, Mayfield School & Early Education Program, Edmonton Public School District**

- Administrating elementary and early education programs and $1.8 million budget
- Facilitating transdisciplinary team model to serve children with special needs and their families and directing the central instructional focus
- Implemented Safe and Caring Schools and Effective Behaviour Support
- Lead Staff Facilitator for school's Central Instructional Focus Initiative

1999 – 2000 **Teacher, Allendale Junior High School, Edmonton Public School District**

- Taught students with Autism Spectrum Disorders and severe behaviour disorders
- Assisted with Superintendent's review of professional development needs for all teachers of students with special needs

1995 – 1999 **Senior Manager, Special Programs Branch, Alberta Learning**

- Coordinated Minister's Safe & Caring Schools Initiative
  - Designed, coordinated, implemented & evaluated Minister's initiative
  - Co-ordinated project leaders, legal agreements, project management
  - Assisted with development and implementation of resources
  - Provided staff development to improve student conduct, reduce violence in schools and promote safe and caring schools

- Administered Special Education Policies and Regulations
  - Assisted with regulatory reform and revisions to provincial legislation, policies and regulations related to administration of special education
  - Interpreted common law and implications of court cases for senior officials related to special education and violence in schools
  - Monitored and approved severe disabilities funding
  - Produced models of promising practices in special education/inclusion
- Facilitated Coordination of Services to Children
  - Assisted with implementation of legislation to protect children involved in prostitution and share information on young offenders in schools
  - Project co-lead for government handbook on responding to child abuse
  - Project co-lead for Case Review Project with Alberta Health (Student Health)
  -

1993 – 1995 **Teacher, Community Living Skills, Ross Sheppard High School, Edmonton Public School District**

- Taught students with Autism and severe behaviour disorders at the high school level and in the community, focus on community life skills instruction
- Completed Master of Arts in Educational Administration

1989 - 1993 **Teacher, Opportunity Program, Hillcrest Junior High School, Edmonton Public School District**

- Piloted and taught students with mild/moderate cognitive delays in inclusive education program at junior high level with an modified academic focus
- Member of Superintendent's Task Force on Integration

1986 – 1989 **Teacher, Junior & Senior Special Education, Onoway High School, Northern Gateway School Division**

- Taught students with severe behaviour disorders using modified curriculum
- Developed district handbook for special education
- Developed understanding about native education and resources

Education and Training

Academic

- Doctor of Philosophy in Educational Administration and Leadership, University of Alberta, 2008
- Master of Arts Educational Administration, San Deigo State University, 1994
- Special Education Graduate Diploma, Educational Psychology, University of Alberta, 1992
- Alberta Permanent Professional Teaching Certificate, 1988
- Bachelor of Education in Special Education, University of Alberta, 1986
- Senior High Matriculation, Edmonton Public Schools, 1981

Certification

- Life Space Crisis Intervention 2004
- Non-violent Crisis Intervention 2004
- Edmonton Public Schools' Principal Education & Development, 2002
- Edmonton Public Schools' Blueprints Initiative, 2002
- University of Oregon & BC Council of Administrators in Special Education's Effective Behaviour Support Provincial Coach, 2002
- Edmonton Police Services, Step Wise Interview Protocol, 2001

Research

- Ph.D. studies in Educational Administration and Leadership focused on identifying policy variables connecting safe and caring schools with inclusive education for public policy implications.
- M.Ed studies identified critical variables for the successful inclusion of students with special needs into regular classrooms, 1994

Professional Involvement

Edmonton Public School District

- Participant, Principal Education and Development, 2002
- Pilot School, Effective Behaviour Supports
- Member, Superintendent's Committee on Professional Development for Teachers of Students with Special Needs, 1999
- Member, Superintendent's Task Force on Integration, 1994
- Leadership Development Program, 1993

MacEwan College

- Co-Chair, Educational Assistant Advisory Committee, 1992 – 2004

The Alberta Teachers' Association

- ➢ Special Education Council
  - Communications Officer, 1999 – 2005
  - Conference Chair, 1992 – 1994, 1998, 2003
  - President, 1994 – 1996
  - Resolutions Committee, 1997 – present
- ➢ Edmonton Public Teachers' Local
  - Executive Member, 1993
  - GETCA Convention President, 1997
  - Resolution Committee, 2000 – 2002
- ➢ Provincial Association
  - Delegate, Annual Representative Assembly, 2000 - 2002
  - Member, Project Overseas, India, 1997
  - Member, University of Alberta's Task Force on Integration, 1993 – 1995
  - Author, Position Paper on Inclusive Education (1995); Funding Framework and Special Education (1996); Accountability in Special Education (2004) [www.specialeducation.ab.ca/publications]

References

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